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ABSTRACT

This publication is a resource to help independent schools attract more families to their institutions and to increase the voluntary support by the larger community surrounding the school. The first chapter attempts to dispel misconceptions, define pertinent marketing terms, and relate their importance to independent schools. The rest of the book outlines specifically how a school can obtain favorable exposure and gives examples of successful outreach programs already employed at independent schools across the country. Chapter 2 focuses on publicity and advertising as marketing tools, with sections on print publicity, radio and television, and advertising concepts. Chapter 3 focuses on publications as marketing tools, with sections on the development of a logo, first impressions, use of photographs, recruitment publications, and audiovisual presentations. A variety of illustrative samples, worksheets, and resources are appended, including school maps, questionnaires, various sample communications, a press kit, fact sheets, and a publications budget worksheet. (TE)

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Marketing Handbook for Independent Schools

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Table of Contents

- 1 Introduction**
- 2 Chapter 1—Adapting Marketing Principles to Schools**
 - 2 A Case for Public Outreach
 - 3 A Basic Definition
An Important Disclaimer
 - 4 Adaptation of the Theory to Schools
Market Research
Step 1—Outside Pressures on Schools
Step 2—Image Analysis
 - 5 Step 3—Looking at Present Clientele
Step 4—Outside Resources
 - 6 Articulating the Product—the School's Mission
 - 7 Opening the School's Doors
The Rule of Closeness
 - 8 Conclusion
- 9 Chapter II—Publicity and Advertising as Marketing Tools**
 - 9 Defining Publicity
Publicity through the Printed Word
 - 10 Publicity through Radio and Television
 - 11 The Tools of Publicity
 - 12 Advertising as a Marketing Tool
Other Advertising Concepts
 - 13 Conclusion
- 14 Chapter III—Publications as Marketing Tools**
 - 14 Corporate Identity—The Logo as a Symbol of the Mission
Growing into a New School Logo
 - 15 First Impressions: The Staples
First Impressions: Covers
 - 16 Publicity from Printing
Assessing the Cover Photo
Putting Photography on the Calendar
 - 17 One Recruiting Piece or More?
What if the School is Full?
When to Publish
New Publication Ideas
 - 18 Collective Recruitment Publications
Being Market "Wise"—Putting the Publication to Work
Every School Publication is a Recruiting Tool
Supplementing Publications with a Media Presentation
 - 19 Planning an A-V Program
A Joint A-V Project
Who Pulls It All Together?
Taking the Reader's Interests to Heart
 - 20 Bringing on the Pro's
When the Job is Done
- 21 Conclusion**
- 22 Appendix I—School Maps**
- 24 Appendix II—Questionnaire to Parents with Students Presently Enrolled**
- 26 Appendix III—Accepted Student Questionnaire**
- 28 Appendix IV—General Components of a Marketing Audit**
- 31 Appendix V—Outside Marketing Resource List**
- 36 Appendix VI—Idea Bank: Spreading the Word — PR/Marketing/Recruitment**
- 38 Appendix VII—Fact Sheet**
- 39 Appendix VIII—Letters to the Editor**
- 40 Appendix IX—Sample PSA**
- 41 Appendix X—Cable TV: Get in on the Last Gold Rush**
- 44 Appendix XI—School Press Kits: What They Should Contain**
- 45 Appendix XII—Sample Press Release**
- 46 Appendix XIII—Sample Press Advisory**
- 47 Appendix XIV—Handling the Negative Story**
- 49 Appendix XV—Advertising is Only Part of School's Overall Marketing**
- 56 Appendix XVI—Getting Your Photography Together**
- 57 Appendix XVII—Publications Budget Worksheet**
- 58 Bibliography**

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Introduction

During the past decade almost every independent school conference has included sessions on marketing, public relations or other school outreach programs. Terms such as market segmentation, strategic planning models, product life cycles and point-of-purchase advertising are bantered about increasingly in independent school circles. However, this terminology and even the notion of employing business school concepts to educational institutions is still approached with a sense of apprehension. Although there are now several excellent resource books on marketing nonprofit institutions, including colleges and universities, there has been no book developed specifically for independent elementary or secondary school administrators.

This publication has been developed to speak directly to NAIS school heads, development directors, admission officers and others in a school who deal with the general public, from potential candidates to alumni to colleagues in the public schools. It is a resource to help schools attract more families to their institutions and increase the voluntary support by the larger community surrounding the school. The first chapter attempts to dispel myths, define relevant business school terms and relate their importance to independent schools. The rest of the book outlines specifically how a school can obtain positive exposure and gives examples of successful outreach programs already employed at independent schools across the country.

The Committee on Boarding Schools, which oversees the major national and international marketing program for its member schools, produced this resource handbook in order to support the efforts of all independent schools in improving public understanding of our breed of education and to cultivate new student markets.

As the Director of Boarding Schools, I have given workshops and speeches across the country on marketing techniques that pertain to independent schools. Often, Anne Rosenfeld, the NAIS Director of Public Information, and Carol Cheney, former Director of Publications and Public Relations at Choate Rosemary Hall and now a nationally recognized communications expert, have joined me in making these presentations. This handbook presents a composite of our talks given at the large annual meetings of such organizations as the National Association of Independent Schools, Council for Advancement and Support of Education and the Secondary School Admission Test Board. We have added a full complement of appendices plus a bibliography prepared by Olive Long, Associate Director of Boarding Schools, to support the more general information in each chapter. The Committee would also like to give special thanks to Carol Cheney for editing, designing and overseeing the production of this resource book.

Sincerely,

Marjo Talbott

Marjo Talbott

Spring, 1985

Chapter I—Adapting Marketing Principles to Schools

A Case For Public Outreach

Before exploring aspects of marketing theory, one needs first to answer the question: "Why do schools seek exposure in the first place?" The obvious answer is that almost everything independent schools need in order to exist comes from others. They depend on students, who are supplied by families with school-age children; they depend on favorable zoning and tax advantages offered by legislators; and they depend on the community's confidence and good will, especially if anything goes wrong on campus. Schools, both individually and collectively, need to make sure that the public is comfortable, if not pleased, with their product. To do so, schools need to demonstrate that they are important and unique educational resources. They have to help shape public opinion.

This is no easy task. The public in general is either unaware, confused or even antagonistic about our schools' identities. Even in favorable newspaper articles, reporters often feel they must include some disclaimer about independent schools, alluding to the students as "preppies in cords" or to the campuses as having "country club atmospheres." Too often one hears independent school faculty members apologize for working where they do—a teacher will say, "This school is unlike other prep schools—our students are normal children from average homes, unlike at X Academy." Even the notion of college preparatory education has been trivialized through a wave of publications and accessories starting with the *Preppie Handbook*, which idolizes the IZOD alligator.

It is not difficult to understand why most Americans look askance at this breed of education. Private schools are, first of all, a tiny group educating only a very small proportion of the total school-age population. They make up only 10 percent of the elementary and secondary scene, and, the independent school subset educates only one-tenth that private sector. It is only human nature to be wary of something that is little known.

Here are some recent statistics from the National Center for Education Statistics.

Total number of school children in the U.S.: 45.2 million

Number of children in nonpublic schools: 5.7 million (12.6%)

Catholic school enrollment as % of total nonpublic school enrollment: 56%

Total number of schools in U.S. (public and private): 112,700

Number of nonpublic schools: 27,700 (24.6%)

Number of Catholic schools—enrollment: 9,700/3.2 million

Number of "other affiliated" schools—enrollment: 10,000/1.4 million

Number of nonaffiliated schools—enrollment: 8,000/1.2 million

Further, most independent schools are referred to as being private, rather than independent. The connotation of the word itself conjures up images of elitism. People feel uncomfortable with any club which may not allow them to join. Public schools, in contrast, are integral to the national heritage; they relate openly to everyone, and no one is excluded. Educating a child outside the public system may be viewed as actually unpatriotic, an attitude particularly prevalent outside New England.

Recently a huge amount of attention has been drawn to education in general. Government reports, private studies and national commissions have come up with their own conclusions on what ingredients are necessary for quality education. Some experts emphasize the importance of a basic, or core, curriculum; some want to disband teachers' unions and reduce the number of students in the classroom; others argue for more courses in ethics.

Most of these reports wag their fingers at public education, and some seem to point to the private schools as a panacea—an academic mecca which has never abandoned the basics, but has continued to incorporate moral education into regular course study while maintaining high standards and good college admission records. Already, however, the pendulum has begun to swing back. Public schools are beginning to defend themselves, even establishing their own recruitment and public relations offices. Independent schools need to be prepared for the shift.

NAIS, Boarding Schools and a number of regional independent school associations have developed public information programs to help their membership shape public perception and encourage consumers and legislators to view independent schools as significant educational resources rather than drains on the community, "siphoning off top students from the public system." These programs are aimed at convincing people that these schools are, in fact, accessible to families who would like to be served by them, regardless of racial or economic background.

Although the collective efforts by a national organization are important, probably the most effective way to shape public opinion is for each independent school to attract positive exposure in its local area. But how does a school accomplish this task? The best method may result from examining and adapting some of the general tenets of marketing theory, developed initially by the business community some 20 years ago and tested (and adapted) for the past decade by many colleges and universities.

A Basic Definition

Marketing consists of a proven set of concepts and practices designed to increase the effectiveness with which organizations relate to their publics. Sometimes it is confused with or thought to be interchangeable with "selling," although it is in fact a much broader theory. Simply stated: Selling focuses on the product, not on the needs of the buyer.

Marketing, in contrast, *begins* with an understanding of the expectations of the consumer. The basic tenet of the theory is that a product (or institution) will be able to advance its mission by taking into account the interest of its actual and potential clients when developing program and policy. It focuses first on the customer's point of view.

Marketing is a disciplined approach to creating, building and maintaining a mutually beneficial relationship between the product and the consumer. Therefore, it entails a multi-stepped approach: first, an analysis of the needs and desires of the target audiences; then the development and implementation of programs which are attractive to the audiences; and finally a thoughtful plan of action to promote these programs to the appropriate audiences. The *last* stage of marketing, therefore, is public relations, not the first.¹

To influence or improve the relationship between an institution and its publics, a marketer can alter four basic elements—the specific nature of the product, its price, its availability and the efforts made to inform people about the product. These ingredients, often referred to as the **MARKETING MIX**, are also known as the four P's: product, price, place and promotion. Again, it is only after analysis and planning that an institution can determine how best to "manipulate" the marketing mix and to communicate its program (i.e. product) to the public.

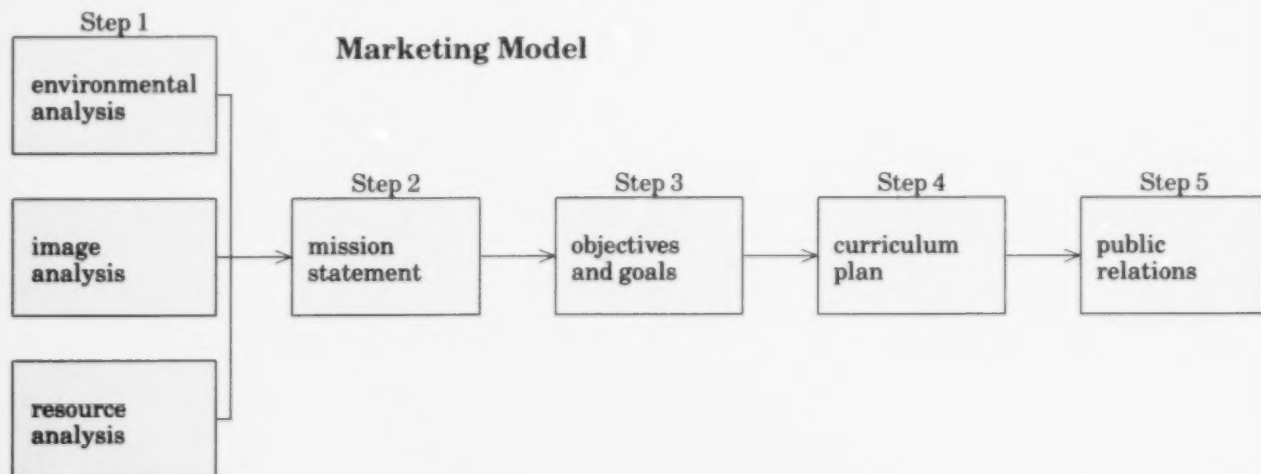
An Important Disclaimer

Although many marketing concepts can be applied effectively to educational institutions, schools should not assume that all of the principles lauded by marketing professionals relate effectively to nonprofit service institutions. Schools by their very nature have different attributes and responsibilities than organizations that are in business to increase the profits of the firm. It is important to extrapolate from marketing theory those dictates and techniques which are relevant and adapt them to each school's particular situation.

As defined above by the corporate community, marketing is, in its purest sense, an approach that focuses on the needs of the consumer and creates and/or presents to the consumer a product that he or she wants. Thus, strictly speaking, the consumer is *sovereign*—his or her desires dictate the form of the product. . . . It would be unfortunate for a school to derive its program from such a principle.

Instead, as outlined in a recent book (published by CEEB), entitled *Applying Market Research in College Admission*, educational institutions should adhere to an adapted idea called "Academic Marketing":

Commercial marketers study consumer behavior with an eye to the consumer's desires as these can be developed by exposure to the product or to the advertisements for it. The admission officers at a selective college that aims at more than survival, when guided by academic market research, can learn where it is feasible to try to persuade students to consider what they will need in four years rather than what they want on graduating from high school, and to show them that the college is responsive to their needs but not slavishly obedient to their wants.²



1. These ideas are based on Philip Kotler's work, *Marketing for NonProfit Organizations*; Englewood Cliffs, New Jersey; Prentice-Hall, 1975.

2. *Applying Market Research in College Admissions* by Larry H. Litten, Daniel Sullivan and David L. Brodigan, College Entrance Examination Board, 1983, pg. xvii.

More simply stated, college and independent school policy makers have an obligation to be responsive to the public's needs (i.e., quality education) but not change their programs on the basis of student whims or passing desires.

Even though it would not be prudent for schools to wholeheartedly adopt industrial/commercial marketing theory, they can gain a great deal by understanding the concepts and by adapting certain principles to improve their institutions.

Adaptation of the Theory to Schools

Returning to the general definition of marketing, in the case of independent schools the product is the school itself—its curriculum-related classroom and nonclassroom activities and programs. The consumers are the students, the faculty, parents, alumni and the general public. A school "marketer" can alter the four P's:

The Product, defined by the school's stated mission, can be changed—a girls school becomes coeducational; instead of having only secondary grades, a school adds kindergarten through sixth grade. A school ceases to offer Latin and, instead, adds Spanish to the curriculum.

The Price, usually determined by tuition, changes annually and often is different for various market segments (consider financial aid, loan or scholarship programs, and creative payment plans). The actual cost of educating a student and the amount of tuition charged also relates to institutional resources, particularly endowment income. Those institutions with larger endowments can afford to charge less.

The Place, or campus, sometimes relocates (or adds facilities) from a recently built-up area to more open space—Holland Hall (OK), University School (OH), but such moves are unusual and certainly expensive. One can address the issue of location in terms of public perception rather than actually moving the school. Schools make themselves more accessible through bus services and better directional signs (Appendix I).

The Promotion, usually handled by the development and admission offices, has become a much more effective tool for schools over the past few years (catalogs, videos, press releases).

As is the case with other products, an independent school needs to know its strengths and weaknesses and have a definite plan for what future directions the school will take before telling potential parents, teachers and donors about the school. In advance of spending precious school staff and financial resources on catalogs and slide shows, the school trustees and head must take Step 1 in the "marketing model," which is called *market research*—an examination of assumptions and a testing of both experience and intuition.

Market Research

Whether various members of the school community orchestrate the market research or the head hires an outside consulting firm to complete the process, it is important to keep in mind that no aspect of planning and implementing a marketing strategy will be effective without the support and cooperation of the academic component of the institution. This is the case because the faculty are the closest to the educational process and must be enlisted for their insights, suggestions and information in all phases of marketing. They will have to live with the end results of the exercise.

Step 1—Outside Pressures on Schools

The school's first job is to identify and discuss major shifts and influences occurring in American society in general and in the school's particular geographical location. By attending national conferences, studying demographic reports, etc., the school may learn such vital facts as: most families will only consider traveling one day to attend a boarding school or one hour to a day school; only half as many students today are scoring in the high reaches of the SATs as compared with a decade ago; the discretionary income per family is increasing with the number of American family units decreasing and the average number of children in each of these units is down to 1.02 (1980) from 2.2 (1965).

The school may also discover that, in its immediate area, the Hispanic population has grown 110% in the last 7 years, that the school's competitor has instigated a loan program to middle income families, that by 1990, 50% of the work force will need at least some knowledge of computer programming and that more and more parents expect a school to provide after-school programs to accommodate their full-time job schedules. With these insights, the school leadership can begin to analyze how effectively the school's educational practices train students to cope with the demands beyond the school's confines, as well as what the school's position seems to be in the setting of the marketplace (how it compares to similar schools in the region).

Step 2—Image Analysis

The school then tries to reach an understanding of how it is currently perceived. It conducts an image analysis, often spearheaded by admission and development officers, using questionnaires to ascertain the school's reputation along all of its constituencies—parents, faculty, students, alumni, trustees and friends (Appendix II). A school may learn that there is a strong consensus on the nature of the school, but that public perception does not reflect reality. Perhaps major changes have taken place internally, but the marketplace still views the school as it existed a decade ago. One marketing rule of thumb is that it takes five to ten years to change a product's image, especially one so

little known or understood as that of an independent school.

Step 3—Looking at Present Clientele

Effective research depends on looking outward as well as inward. In conjunction with defining external pressures on the school and general public perception, a school continually needs to evaluate the present demographics of its student body.

In a survey conducted by the Boarding Schools Program, figures indicate that 43% of the students enrolled in boarding schools are the first in their families to attend an independent school, and the percent of working mothers grew from 33% in 1976 to 47% in 1982. It is important to know why a family chooses a school. If it was to escape the poorly run public middle school, the family may be planning to return to the public system in ninth or tenth grade. Applicants seem to be shopping around more these days; last-minute decisions to withdraw from enrollment agreements are more prevalent. Schools must be prepared for these phenomena—planning for them rather than just reacting to them.

One of the most important precepts of marketing, and the one most usually challenged by school administrators, deals with the school tying into motives that the consumer population already possesses. Products, including schools, rarely create motives in people. Schools have changed their programs *because of* consumer preferences. For instance, the decline of single-sex education was at least partly due to public pressure—the decision to become coeducational was as much a pragmatic one as a philosophical one. The rise of the women's movement certainly had a part in stimulating an examination of single sex vs. coed education. Perhaps the first few colleges and schools who decided to become coed did so because of their conviction that educating young men and women together made better educational sense than educating them separately. Downstream, however, this sense turned to concern about "cents"; single sex institutions were losing students to coed institutions. Enrollments fell and fiscal health was threatened. It became a matter of survival to become coed rather than educational pioneering.

As noted in "the Disclaimer" on page 3, this is not to say that a school must change each time a new trend surfaces or that the board of trustees must promise students "Whatever you want we'll provide." Schools have to understand and uphold the essential soul of the institution—what it believes and stands for. At the same time, schools do need to be aware of what motivates their population to pay 4- to 12-thousand-dollar tuitions each year to educate the young.

In fact, as Joel Strangis, formerly at Sayre School (KY), noted at the 1985 NAIS Annual Conference:

You may be able to slip in a foreign language sequence or three years of a math "requirement" but ultimately you can't require anything. If a student doesn't like your curriculum, he or she will just quit—either figuratively or literally. And that freedom is, believe it or not, the greatest strength of independent education. The students are there because they want to be!

In order to evaluate who is coming to a school, it is helpful to survey those who inquire and apply, including those who turn down an invitation to enroll in favor of another institution. Schools that have done such surveys have had an amazingly high return on questionnaires—as many as 80% of the applicants answer the questions (Appendix III).

In conjunction with this analysis, the school must also take stock of its present programs and resources and determine if in fact they coincide with the expectations of their present clients and those they hope to attract five years from now. Do they reflect the needs of the consumer (Appendix IV)?

Step 4—Outside Resources

Some schools feel they do not have the staff time or resources to develop their own market research tools. There is also the possibility that an in-house team may inadvertently build biases into a study, thus jeopardizing the reliability and validity of the results. They turn, instead, to outside experts to help conduct the research (Appendix V).

For help in constructing effective research tools, one can hire a management consulting firm with a department specializing in opinion and image analysis. A proposal from such an organization may be broken down into stages or phases of the strategic planning process, such as: 1) conduct research, 2) develop the strategy and plan, 3) implement the plan. For one school in 1983, such a proposal entailed a cost for each phase of between \$9,000 and \$15,000. The school decided to hire the firm to do phase 1—to assess the school's overall image, its perceived strengths and weaknesses by the outside community, how closely these external perceptions match views held by the school's board, administration and faculty and how to begin analyzing the school's mission with respect to the current demands of the market place. Phases 2 and 3 were handled by the school. Another avenue to pursue is to engage an organization that serves almost exclusively independent schools such as Independent School Management.

Schools can also use data from studies conducted by firms who work primarily with the school's development office. Often there are valuable results of surveys designed to help determine institutional strengths and weaknesses in connection with major fund-raising efforts, such as a capital campaign. One type of institutional survey focuses on lengthy interviews with 35 people who can "appreciably influence the institution's

future." Questions cover all aspects of school operation, ranging from trustee relations to admission practices, college counseling and curriculum planning. The survey's purpose is to determine the attitudes, and when possible, the reasons for the attitudes of people who really care about the school. Such a study, however, will probably not explain how to attract nontraditional markets or determine general community opinion outside the school.

In recent years, some admission experts have left their positions at particular schools and have established their own consulting firms. These services, aimed at helping schools assess their marketing efforts in relation to student recruitment, range in cost from \$2,000 to \$10,000 a year.

There are other sources of help for schools who wish to conduct market research. CASE, the Council for Advancement and Support of Education, has published a handbook *Attitude and Opinion Research*, which contains a comprehensive bibliography and appendices listing a number of marketing firms and sample surveys.

One major caveat for the school turning to an outside source for help is: **DO NOT LOSE CONTROL OF THE PROJECT.** It is essential that any aspect of marketing, if it is to be useful, must be "owned" by the school community, not just by the head and the consulting firm staff. The admission and development directors and key faculty members must feel they are an important part of the process. They must feel confident in and not threatened by the people conducting the research.

Articulating the Product—the School's Mission

The purpose of the research is to allow the school to assess if the present product is compatible with the needs of the marketplace. More specifically, it is to learn what changes, if any, need to be made in order to maintain enrollments or attract more students to apply (or to convince more people to give). With data from the research, the board and head can assess whether or not the school's stated mission reflects the public's image of the institution and attends to the present and future demands of the marketplace. They can determine if the current program meets the abilities and demands of the students and their families today or if some aspects of the program have become outmoded.

The school leaders need to ask and answer the following questions:

- What business are we in (college prep, elementary school, moral development, family counseling)?
- Who are our customers (5-12-year-old students within a 30-minute radius)?

- Which needs are we trying to satisfy (college entrance, day care problems, computer literacy)?
- On which market segments do we want to focus our recruitment efforts *this year* (motivated students, football players, minority families)?
- Who are our major competitors for students, for voluntary contributions (the local public school, the parochial school, national boarding schools, the museum, Red Cross, Planned Parenthood)?
- What competitive benefits do we want to offer our target markets (exceptional campus, early hours, housing, 24-hour faculty, small classrooms)?

By answering these questions, the trustees can assess the present stated mission and, if necessary, redraft it in order to identify accurately the school's character and goals. Articulating the essential personality of the school in a concise statement gives the school's leaders, as well as the consumers, a sense of the specific objectives the school expects to achieve. This process helps define the product for the public, and it gives the school a healthy position in the marketplace. Promotional pieces must state the school's mission accurately in basic, simple language. In fact, all institutional publications should reflect the school's stated mission. While this may sound obvious, many schools fail to put their best foot forward in the printed word (See Chapter III). One example of a very clear and useful mission statement comes from the Bolles School (FL), an excerpt of which follows:

The Bolles School seeks to structure its student body so that its composition reflects the demographics of the community area served as closely as possible and practical. Recognizing that geography, economics, and other personal factors play a large role in school selection, Bolles, nevertheless seeks to serve as an alternative educational opportunity for the widest range of applicants possible. Efforts in minority enrollment, need-based financial aid awards, and a broad representation of unique talents and attributes are a major commitment in the School's admission functions. In this way it is our belief that Bolles can best serve not only our community, but our students by providing a realistic and representative setting for their educational pursuits.

Once stated, the school's philosophy needs to be understood and accepted by the total school population, and the life of the school must reflect its stated mission. For example, a school which defines itself as a 24-hour community should think twice about using a telephone answering machine from 4 p.m. to 8 a.m. each day. A school with a philosophy sensitive to male-female issues should not ask on the application form a recommendation from the "previous headmaster." If a school says it adheres to the School Scholarship Service formula and has a financial aid program based solely on a family's financial need, students receiving grants should not then be expected to fulfill special standards such as maintaining a C or better grade average. If a

school is an amalgamated institution made up of predecessor schools, it must create new, unified promotional materials that represent today's reality.

Step 4 of the marketing model "Curriculum Plan" calls for the implementation of curriculum and other program changes based on findings and recommendations in the mission statement. Frequently, a curriculum review committee, composed of faculty and administrators (and in some cases, parents or trustees) is established to bring the school's educational offerings in line with marketing goals. Schools committed to attending to children with a wide range of abilities may add skill-building courses or special tutoring programs along with enrichment courses for the gifted. Schools committed to equal opportunities for women and men may add readings on women's issues and/or by women authors to the English and history curricula.

Opening the School's Doors

After completing the interwoven steps of analyzing the present situation and trends, reasserting or redefining a school's identity/mission and making sure that the school's program fits this mission, a school is ready to reach out more and seek new clients (Appendix VI). In reality, these processes will go on simultaneously and continuously, it should be noted.

Schools should explore ways in which they can support the interest of the community at large and open the campus to people not enrolling children in the regular school-year program. For example, more and more schools have tied into the public's interest in computer education by offering night courses on LOGO to adults in the surrounding community and by attracting public school children to summer computer camps.

Schools have begun to open their facilities (theater, hockey rink, tennis courts) to the town at night and on weekends. Some have sponsored community-wide events such as the Special Olympics, let the local country club use their pool for major meets and offered their campus to companies for family picnics. Others are designated as voting centers or Bloodmobile sites. Whenever guests are on campus, the office in charge of public relations should make sure that school information brochures are placed in conspicuous places for people to pick up. At some schools, the custodial staff and guards are primed to hand out pamphlets to unexpected visitors when school is officially closed (Appendix VII). The business office can include a flyer on the school in remittance envelopes when paying school bills.

Many schools offer programs during the summer which bring new clientele to campus. Some of these students may be potential candidates for the regular academic program or have siblings or friends that would be. Mailing lists of participants in summer programs should be compiled, and those families should receive information about the school. Information pamphlets should of course, be on hand on campus for pick-up and/or formal distribution during the summer session(s).

Some schools have cosponsored with their public school counterparts science, art and craft shows. One dean of students organized a ski trip which was open to all the kids in the community. Other administrators have initiated speaker bureaus made up of faculty members who are willing to talk to the Rotary, PTA, Kiwanis or other organizations. Administrators and Faculty members are encouraged to become active in civic organizations, with the school footing the bill for some memberships. At other places, students are able to register with a school job bank which provides baby sitters and gardeners to the local community. One school sponsored a public television show, through which it received excellent, positive exposure in the community.

These special events and programs, on campus and off, make good fodder for publicity. A media relations campaign should be planned in conjunction with each program or special event. Announcements beforehand in the newspaper, an invitation to the press to attend and cover the event, or a feature or news story placed in a newspaper afterward enhance the positive public relations effects of the event itself (the next chapter outlines, step by step, how to orchestrate such publicity).

The Rule of Closeness

Some marketing plans attempt to reach people throughout the entire country. Consider the needs of a major Eastern boarding school, which defines itself as a national high school and seeks visibility across the United States. At the other end of the spectrum is the small day school, which is best off concentrating its energy on those people who have inquired about the school on their own. Marketing professionals call this practice the rule of closeness. It is ignored too often by many of our schools. An admission officer can devote so much attention to publishing a piece in a magazine or setting up an open house or wooing an educational counselor that he or she neglects the individual families calling for information or visiting the school. Consider for a moment: How much attention is given current parents and alums and how much are they involved in the life of the school?

Other questions a school needs to ask itself include: Is there a sign at the entrance of the school easily visible to guests? Are rooms and buildings marked clearly? Is the telephone receptionist friendly, informative and efficient? Do teachers act resentful when their classes are visited by a prospective parent or donor? What do students, teachers, parents and alumni say about the school? How do the students conduct themselves during sports meets? Are buildings and grounds well kept or in need of repair and cleaning?

Reaching out to make a positive impact on the community requires creative thinking and what may seem initially a lot of "extra" effort. However, schools must be recognized as corporate entities with substantial resources to offer—in program, facilities and people power—if they are to gain the understanding and acceptance of the constituencies they seek to serve.

Conclusion

As sophisticated as independent schools may be in terms of the education they offer young people, most of these institutions are naive about the *business* of education. No longer can schools dwell in splendid isolation, relying on reputation and tradition as recruitment tools. New bonds must be forged with the community for a school to ensure its future viability, and resources must be allocated to the research and assessment phases of marketing as well as to the promotional phase of marketing. In order to carry out the mission of educating youth, schools must find nontraditional sources of revenue to maintain their stated goals and objectives, or else cut off qualified and desirable applicants by increasingly high tuitions. At the same time, schools must reevaluate their programs in light of social and technological changes during the last few decades, keeping an eye on the future and on what new needs may emerge as America rethinks education in general.

Taking the time to analyze both the external and internal factors that affect the business of education and to articulate the personality and mission of a school is no longer a luxury. It is a necessity. The next sections of this handbook address ways in which schools can communicate with the public—once they have accomplished the important preliminary work—through publicity, advertising and school publications.

Chapter II—Publicity and Advertising as Marketing Tools

At the beginning of Chapter I, the case was made that independent schools need to seek public exposure. In order to achieve this goal, they must learn to communicate effectively with those outside the school structure. The key to this process is in having a well thought-out, comprehensive, long-range promotion plan (the last stage of the Marketing Model, page 3). Promotion can involve the use of a wide variety of methods: personal contact, direct mail, special events, school fairs, school publications, publicity and advertising. No single approach will reach everybody, yet a school may not have the resources to develop all of them. Successful outreach depends on choosing the right mix and allowing the methods of communication to interrelate so that they support and enhance each other.

This chapter focuses on two important kinds of promotion—publicity and advertising. The use of publications and direct mail will be dealt with at greater length in the next chapter.

While most schools do not need convincing that publicity—at least positive publicity—can help advance the interests of the institution, they have taken a passive stance with regard to gaining access to this resource. They look upon publicity as the unexpected beneficial fall-out from some meritorious achievement or special event. The best publicity doesn't just happen—the school must make it happen by understanding what it is and how to use it to best advantage.

Defining Publicity

Basically publicity is exposure free of charge, although a school does incur some expenses (staff time, printing and distribution cost, etc.). A distinct advantage of publicity is that it carries with it a special authority or credibility, because the message is part of the editorial content of the medium. Once an item is included in an article or on a radio or television program, it is perceived as important and true.

Obtaining publicity depends on knowing how to deal with the people who are the intermediaries between a school and its audiences. Editors, reporters and producers are the ones with the decision-making power. A school must demonstrate that its story is important to the particular audiences each medium serves. The message must be “packaged” in the ways that best suit media needs or the news may be used incorrectly, appear at a time or in a place that is inappropriate for reaching the intended market or not be used at all.

Therefore, it is important to identify which market or markets to reach and to select the appropriate media that already have the attention of those audiences.

In order to harness publicity to work positively for an

institution, the administration must believe in the benefits accruing from exposure in newspapers, magazines and on radio and TV. Further the school must commit resources and staff time to “doing” publicity if it is to yield any substantial results. A paid or volunteer staff member must assemble the tools necessary to crack the media safe, beginning with a thorough knowledge of the various kinds of publicity available.

Publicity through the Printed Word

News Stories

Independent schools don't generally fare well on the front pages of major daily newspapers. They are often used as a point of comparison to public schools, for the sensationalistic value of a problem on campus or as part of a major trend in education (which can be positive or negative, e.g., a teacher shortage or enrollment trend).

The one area where “hard” news stories are apt to be in the independent school interest is in the reporting of a major trend in independent schools, which they themselves bring to light collectively, such as an increase in voluntary support, an increase in the amount of financial aid, a growth in minority enrollment or employment, a new emphasis on gender-balanced curricula.

Feature Stories

Lifestyle and feature sections of newspapers generally treat independent schools more favorably. Feature stories, often called “soft” news are intended to lighten the effect of the “hard” news. Features generally focus on stories with a happy outcome, have a personal human interest angle and report on interesting, original, out-of-the-ordinary happenings. Here is where independent schools excel. An innovative program or an interesting personality on campus may show itself to good advantage on these pages. Schools will find it well worth their while to suggest story ideas to feature editors.

Some newspapers and many magazines accept feature stories from freelance writers. Others assign staff writers to prepare articles. The publicist should find out the *modus operandi* of the periodicals and newspapers the school plans to approach. The publicist can offer to write the article or ask if the editor would like to assign a staff reporter or a professional freelance writer to the article.

Special Sections and Special Interest Journals

It is helpful to inquire periodically whether general interest newspapers and magazines are planning special supplements. If so they can be approached with

plenty of lead time with relevant story ideas. An upcoming sports special, for instance, may lend itself to a story on a school's fencing team, an education supplement to a story on a school-based teacher training program, or a camping section to an article on an all-school wilderness trek. Imagination, resourceful thinking and simply keeping in touch with news media can really pay off here. Special interest magazines are fertile ground for the same sort of story ideas and should not be overlooked.

Editorial and Commentary Columns

Editorial writers and columnists welcome hearing from their readers. Should an educational or public policy issue arise that editors or columnists may wish to comment on, the publicist should call them up or drop a note to plant the seed, explaining why you think the issue is important and what the school's opinion is on the subject. In so doing, the publicist may help persuade them to adopt a position favorable to independent education or to his or her school, or simply to call public attention to an important issue that might otherwise go overlooked.

Op-ed and Letters to the Editor

Op-ed, literally meaning opposite to the editorial page, offers an excellent opportunity for exposure. Here, usually on the page following the editorials, short articles, often written by members of the outside community, express viewpoints on important issues. Publicists should study the length and type of subject matter covered by op-ed pieces in their newspapers.

The op-ed editor can be contacted about whether a certain subject would be of interest to the newspaper. If the publicist gets a green light, he or she should write the piece to the appropriate length and send it, along with a cover letter, directly to the op-ed editor. The newspaper reserves the right, of course, not to publish it, but enough schools have met with success often enough to make their efforts worthwhile. A program to have members of the faculty, administrators, parents, students and trustees take turns in writing occasional op-ed pieces on timely subjects—each is an authority on some topic, after all—can keep a school's name and public position before the public.

The letters to the editor section is one of the more heavily read parts of the newspaper, with a minimum of one in four readers turning attention to this section. Encouraging members of the school community to write letters to the editor will increase the number of times the school is represented in this section (Appendix VIII).

Calendar Sections

Special events to which the outside community is invited and admission test dates should be listed in the calendar section of newspapers and the local city magazine. The lead time required for such announcements is sometimes surprisingly long in advance and the publicist should know the deadline and the form in which

the editor needs the information. (Does he/she just want the facts sent or should the school write up the copy?) Following the same guidelines, schools can use the section to announce each special event that will be occurring on campus during the year.

Hometown Newspapers

Many local, suburban or weekly newspapers welcome material on the doings of people who live within their distribution areas. When a student receives a particular honor, a teacher a prize, a trustee a role in a major conference, sending a "hometown" press release to the local newspaper in the appropriate home town may result in a nice article. Most schools have scores of opportunities for this type of publicity.

Publicity through Radio and Television

News

Radio and television news average no more than 50 words per story—not very long and certainly not long enough to explore a subject in any meaningful depth. The word and time allotment offer little more than headline reporting. Independent schools, usually preferring more thoughtful analysis, generally find that this type of journalism does not often offer positive treatment.

An exception to this general rule would be a short feature story illustrating a campus special event having a very visual aspect. A good example occurred when Watkinson School (CT), as part of its centennial celebration, arranged for the school head to arrive at an outdoor school gathering in a colorful hot air balloon. The media was notified in advance, and the television crews came out in force giving excellent coverage on the evening news.

To capture this kind of attention, one must first stage an event and pre-alert the assignment editor at the news stations. A press advisory followed by a phone call is a good way to notify them.

Editorial and Editorial Rebuttal

Broadcast stations that make use of editorials also usually make editorial or rebuttal time available to interested groups or individuals. Radio and television editorializing may be a good platform for bringing others over to the school's position on public policy or an important issue.

School publicists should know which local stations offer editorial time, the length of time allotted, the maximum and minimum number of words necessary, and whether the editorial should be done in the studio or taped outside. The copy should be written as succinctly as possible, keeping the audience to be addressed in mind. An articulate spokesperson should be chosen to make the tape, someone whose job, rank or knowledge makes him or her appropriate to comment on the particular issue.

Public Service Announcements

Required by the FCC, broadcasters must set aside a certain amount of time free of charge for public service announcements (PSAs). PSAs must be in the public interest and are usually sponsored by community or nonprofit organizations. Schools might use PSAs to invite the public to an open house, announce a special program or event on campus or give "learning tips" to parents.

Schools need to keep in mind that competition for this free air time is keen so one must present a good case for using the PSA to reach the community.

Publicists should call stations to find out what their PSA requirements are. Most stations have public affairs directors whose job it is to help the public with just such information and to choose which PSAs to use. Prerecorded PSAs, especially for television, may require sophisticated studio production. Publicists should inquire whether to produce the spot themselves (which may mean professional assistance) or they may be able to use the station's production studios and personnel.

Typed PSAs, which the station's announcer will read on the air, should be sent in well in advance of the air dates being sought, so the publicist must know how much lead time is required. The copy should be double or triple spaced and typed uppercase (for ease in reading). A start and stop date for airing should appear at the top of the page, the number of words in the text and the length of time it will take to read. PSAs should be written for 10-, 20-, 30- or 60-second spots, although 10-, 20- and 30-second spots are more likely to be used.

A good introduction to preparing PSAs is presented in *If You Want Air Time*, published by National Association of Broadcasters, Station Services Department, 1771 N St., N.W., Washington, D.C. 20036. (Appendix IX).

Public Affairs Interview and Talk Shows

Public affairs interview and talk shows are an important source of free air time. Producers are usually open to suggestions for good topics and articulate guests for their shows. Here is where schools may show themselves off to good advantage using members of the school community as spokespersons: administrators, trustees, teachers, students. A program on high school sports might be done, for instance, with students and coaches as guests. Schools should be resourceful in thinking of appropriate topics for the audiences of the interview and talk shows reached in their area and should call or write the producers with suggestions.

Cable Television

Cable television offers many ways for schools to become known by and be of service to their local communities. Local cable companies may, for instance, be interested in cablecasting interesting speakers who come to your school (Appendix X).

The Tools of Publicity

Understanding the various forms publicity can take is only part of the publicist's job. There are conventions, which if followed, will make the probability of gaining positive exposure much greater.

The Media List

A card or computer file of all media the school wants to "do business with" should be set up and carefully maintained. The file listings should include address, telephone number, the names of editors, producers, columnists, reporters, researchers, and public affairs directors. The school publicist should become familiar with the content, publication schedules and quirks on each press and media listing. A phone call or visit can help clarify questions and serves as an important introduction. The publicist should view his or her work as a partnership with those who are in a position to put the school in print or on the air.

The Press Kit

The publicist should prepare a basic press kit with background information on the school to use whenever meeting with or writing to a journalist. Customarily, journalists file this information to draw on later when writing about education in general or a particular school. When a newsworthy event occurs, the publicist can add information about it to the basic press kit to present to the press (Appendix XI).

The Press Release

The press release is still the basic means of communication with the press. Its purpose is twofold: To alert the press to an important event, trend, or story and persuade them to write about it; and to provide ready-made material for publication. Many smaller newspapers publish press releases verbatim. Certain journalistic conventions should be observed in preparing press releases (Appendix XII).

The Press Advisory and Lead Sheet

Other means of communicating newsworthy information to the press are through press advisories and lead sheets. The former is an invitation to the press to cover an upcoming event such as a major speaker on campus, an open house or other special event. The advisory contains information about the event, its purpose, importance, whereabouts, date, time and participants (Appendix XIII). The lead sheet is a list, usually one page only, of story ideas emanating from the school. The publicist can list several story suggestions—one sentence each—and invite journalists to call for more information. Lead sheets are particularly useful during the summer when newspapers are preparing back-to-school articles. Journalists sometimes gratefully follow up on ideas presented to them this way. The school name, address and telephone number and the publicist's name should appear at the top of the page as with a press release.

The Press Conference

The calling of a press conference alerts the press to the fact that something of major importance will be announced. Consequently, press conferences should be used very sparingly. If reporters find they have been called for a minor reason only, they are unlikely to turn up at the next press conference when something really important may be announced.

There are at least three instances which may call for a press conference: When the school is doing something that will have impact on the community (such as adding major new facilities that can be used by the public, e.g., theater, hockey rink), when the news is of major proportions (as with a \$10 million gift), and when there is a crisis on campus that the press is clamoring to cover (Appendix XIV).

If a press conference seems to be in order, good planning will help things go smoothly. The publicist should:

- Invite all local and other media by a written advisory followed by a phone call
- Arrange to hold the press conference in the school or elsewhere in a large enough room with ample electrical outlets and power (for radio and television equipment) as well as ample seating
- Prepare press kits and fact sheets with specific information about the announcement to be made, including key people involved
- Have coffee and a snack available as a courtesy to reporters and technical crews
- Help prepare an articulate, high-ranking spokesperson to make brief remarks about the event, its significance, and the school's position with respect to it
- Allow for a question and answer period, introducing other experts to answer questions at this time, if appropriate
- Maintain a press sign-in sheet so there will be a record of who attended
- Hire a clipping service, or track the media afterward to monitor the resulting publicity
- Evaluate the handling of the press conference, making notes on experience what to do differently next time.

The Personal Touch

There is no substitute for personal contact. Knowing the people who will be writing about a school is the single most important step toward gaining publicity. Publicists should invite reporters to visit the school; pay a short introductory visit in their places of work; drop off a press kit after it has been created; get to know reporters over the phone; offer to be helpful and

to let them know if something important happens at the school; ask what kinds of things would be of interest to them; ask what their readers or viewers would like to know about independent schools. Publicists must remain friendly through thick and thin; a positive attitude will pay off. Remember, however, no matter how friendly the relationship becomes, reporters do not keep secrets. Journalists are in the business of seeking the truth and that is what they will report. Publicists and other school spokespersons should always speak *on the record*.

Advertising as a Marketing Tool

Advertising works well as a partner to publicity. Whereas publicity is dependent on third party interpretation (through reporters, editors, and producers), advertising is a direct communication from advertisers to audience. Advertising allows the school to control the timing, manner and message as well as where, when and to whom the communication takes place.

Advertising practice holds that six basic decisions must be made before attempting an advertising campaign:

- 1) What is/are the specific *goal(s)*?
- 2) Who is/are the specific *market(s)*?
- 3) What is/are the specific *message(s)*?
- 4) Which *media* will best reach the target audience(s)?
- 5) How much *money* will the school spend?
- 6) How will the school *measure* the effectiveness of the ad campaign?

A school must be explicit in setting its advertising goal. Examples of specific goals are: to increase the total applicant pool; to retain the school's share of the current independent school market; to tap a new market; to introduce a new school head to the community; to raise morale at the school; to explain why high tuitions are necessary; to stave off government regulation; to "sell" the financial community on giving; to even out a seasonal rush on the admission office; to clarify or change the school's image. An entire advertising campaign might be built around just one of these objectives (Appendix XV).

Other Advertising Concepts

Message Strategy

Another key concept in advertising is message strategy. The message strategy is a written statement of who the anticipated markets will be, why they will be consumers of your product, and the tone, manner and specific arguments a school will use in approaching them. For instance, a school may identify the target audience to be all families with school-age children in a certain town. They will become consumers of the product—excellent academics—because academics teach children to develop critical thinking skills. A support statement showing why critical thinking skills are important should be added.

Finally, the tone and manner of the advertisements should be chosen for their ability to give a flavor of the school atmosphere—clear, upbeat, personal, serious.

Key Consumer Benefits

In defining message strategy, advertising professionals consider consumer benefits. A consumer benefit is not what the consumer gets *per se* from the school—excellent academics—but what he or she gets out of it—critical thinking skills. Advertising sells beauty, not lipstick; critical thinking, not academics, as a benefit to the consumer.

Market Segmentation

Market segmentation is identifying groups who desire in common the same consumer benefits. If a school's key consumer benefit is critical thinking skills, then groups who value that are the ones to set as target audiences.

Positioning

Positioning is differentiating a school from its competition, deciding which product attributes and consumer benefits to emphasize. For instance, although other schools may teach critical thinking skills, one particular school may be the only one in town using the Socratic teaching method.

The Effects of Advertising on Behavior

Advertising is the process of attempting to influence behavior. Before behavior modification can result, awareness and attitudes must be shaped. A succession of advertising campaigns may be called for. For instance, if a school is trying to increase enrollment, an initial "wave" of advertisements might be used to create awareness of the school, a second "wave" to make people prefer the school over others, and a third "wave" to induce them to act by calling or visiting the school. The third series of advertisements might produce good results, but only because the first two series paved the way.

Where to Place Advertisements

Many media outlets lend themselves nicely to independent school advertising. In addition to newspapers and magazines, schools should consider advertising in symphony programs, museum guides, special interest magazines, professional journals, real estate journals, college alumni magazines, or sponsoring an educational program on public radio or television. Public service style advertisements, such as "education tips for parents," run on radio, television or in newspapers or magazines are also worthwhile.

Conclusion

Advertising is but one component of a communications mix geared to gain exposure for the school that will foster positive public opinion/behavior and ultimately help further the goals of the institution. The most effective work in public outreach, be it advertising, spe-

cial events or publicity, can be done only after market research has been completed and a comprehensive plan of action for articulating the school to the public has been outlined.

Communication is not a "one-shot-deal;" it is an ongoing process involving a complex set of activities whose effects will be felt over a long period of time.

Chapter III—Publications as Marketing Tools

One major way in which schools communicate with the public is through publications and other printed materials. From the school letterhead to the monthly newsletter to the all-important recruitment brochure, signals are transmitted about a school's identity, what it does and how it feels about itself as an institution. For many schools, the job of producing basic materials "to keep the place running" is passed out among several individuals, and no real thought is given to the combined impact of the school's publications taken all together. Now is the time to begin to coordinate the publications effort with the overall public relations program in response to the objectives developed from marketing studies about the school. No longer can schools afford to produce haphazard printed messages, but to unify the graphic image of the institution to reflect a well-orchestrated school management.

Corporate Identity—The Logo as a Symbol of the Mission

Borrowing from the corporate world, it is possible to see how often huge, complex and impersonal enterprises come to have positive associations through the use of trademarks or logos, as they have come to be called. The mark or symbol helps characterize the institution, presenting to the public a face, or personality.

Trademarks have a sales function as a major job. Graphic designers are likely to begin their work with a researched statement as to which segments of the population the trademark is supposed to serve and what characteristics of the organization it should convey. Some trademarks are successful because they have long histories and have become a meaningful part of American tradition, such as "Mr. New Yorker," Eustace Tilly, designed in 1925 and subsequently never changed. Other trademarks are altered subtly as graphic preferences change in order to keep the mark fresh and current. Everyone remembers seeing Shell signs being replaced at local gas stations by new signs with a more abstract, contemporary rendering of the still familiar shell design. McDonald's has gained such vast exposure that it is firmly a part of American culture. The corporation can afford to use much smaller golden arches than before, because name recognition has become virtually automatic.

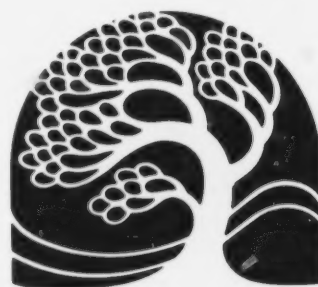
In recent years there has been a proliferation of trademark use for broader purposes, with many well executed symbols for small businesses and professions, local enterprises and nonprofit institutions. The talent focused on a charitable organization is frequently of the same caliber as that used for the most intensively researched and well supported (financially) corporate

identity program. Today's public has a greater appreciation of typography and sophisticated graphics than in the past.

Growing into a New School Logo

A designer for a new school logo or trademark would consider that it will be worn on athletic uniforms, on patches and t-shirts, and it will be printed on letterhead, notebooks, blankets, mugs and jewelry. The logo will be used for advertising and recruitment purposes. All of the potential applications involve psychological and technical criteria. The logo design must reflect the dignity and tradition of the institution as well as its forward-looking aspects. It must be sophisticated enough to convey the idea of quality education and yet not be stuffy. Technically, it must be simple enough to be reproducible in many forms and yet keep its design integrity and clarity. It must be legible and memorable.

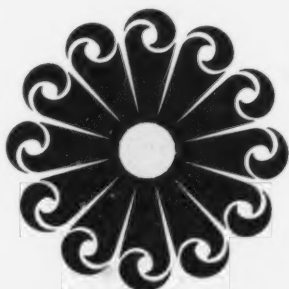
Many schools are still relying on outmoded heraldic shields or seals as their corporate trademark; and what kind of image do such symbols conjure up? One thinks of royalty, of clans and exclusive family ties—just the sort of posture most schools are trying to move away from. Perhaps a more positive approach for a school developing a new logo is to select an architectural detail from the campus that has some meaning to its graduates; a symbol of education; or a graphic rendering of letters in the school name to represent (at a glance, in a nutshell) the current school's personality and mission. The design must necessarily take into account the audience the school is trying to reach and what their response will be to the image making.³



Hawaii Preparatory Academy

3. Based on ideas in *American Trademark Designs* by Barbara Baer Capitman, Dover Publications, Inc., 1976.

PROCTOR



NASHOBA BROOKS SCHOOL

First Impressions: The Staples

Keeping in mind that many of the principles governing the design of an institutional symbol hold true for other printed matter, it may be useful to take a look at the first impressions schools make in their publications.

An institution's letterhead should be on nice-quality stock, and all pieces (8½ x 11 sheets, Monarch and note-size sheets, envelopes, mailing labels and so forth) should match as to ink color, type style and rendering of the logo. Schools who fail to coordinate the basics not only communicate managerial chaos or bungling, but also probably duplicate orders and spend more than they need to. Plan in the summer the coming year's stationery needs for *all* departments and have everything printed together. Outdated stationery should be recycled as notepads or be thrown out.

How does the school's mail look when it arrives in a prospective family's or graduate's mailbox? This is the first-first impression. Envelopes should have either a printed return address (plus appropriate graphics) or a mailing label with same. Not both. The use of a postage meter slug with an educational message offers schools an inexpensive way to make an additional positive statement right up front. Color and bold, large type help a school's letter or admission package stand out from the rest of the mail.

Those wishing to give up a letterhead that is old and tired should begin collecting samples of letterhead from various organizations that make an impact—either positive or negative. The seed of an idea can emerge from analyzing colors, type styles and formats of pieces that one likes or that one responds to with a

ho-hum or a strong negative shrug. It may be wise to turn to a professional designer for help in executing finished artwork that best represents the mission statement as researched in the first marketing phase.

First Impressions: Covers

More "first impressions" are made by what schools choose to show on the covers of publications. Too often the photo files are deficient and compromises are made in considering what kinds of visuals will work best for the audience the school is trying to influence. Many schools opt to use a photograph of a school building as the introduction to a student recruitment piece. Such a choice is "safe"—one can avoid worrying about getting exactly the right grouping of students captured on film. But, such a choice may not be the effective one.

Louisville Collegiate School abandoned a 4-color doorway shot, which was a nice photo, in favor of a photo of two students looking straight on at the viewer. The school did some research first to find out what kinds of photos are most appealing to the families the school wished to reach, and the vote came in for people, not doorways. Quite a lot of information is conveyed through the photograph and without any need for words. One can see that the school is coeducational, that academics are important (as evidenced by the big loads of books the boy and girl are carrying) that there is structure and order (the students are in formal dress code) and that people are happy there. The architecture of the school is hinted at by the inclusion of the archways in the background. The head-on posture engages the viewer with a sense of forthrightness and an implied invitation to "visit" the campus in the pages of the brochure.



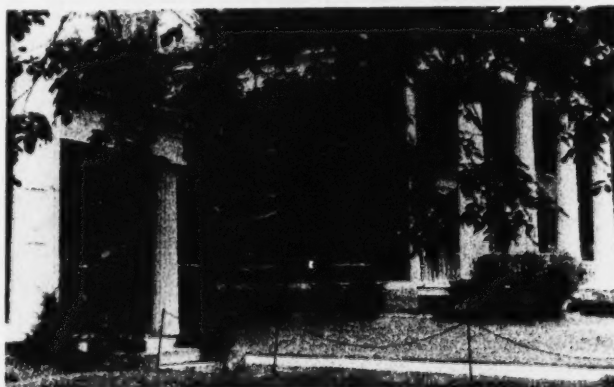
Some schools try to show too much on their recruitment brochure covers by including several photos of typical activities. In this case the reader's eye may notice more the arrangement (or confusion) of the photos rather than focusing in on the content of the photos. From a marketing standpoint there is an inversion of importance in terms of what is important to the customer, with the focus on facilities and activities rather than on benefits to the buyer, as discussed earlier in this handbook. In computer lingo, the aim is for "user-friendly" pictures. In commercial advertising, the photos sell the "sizzle," not just the steak.

Other schools show too little on their covers by simply running the name of the school and perhaps the logo on a colored background. Graphically this can be construed as a missed opportunity to introduce a school to its readers through the use of stimulating and visually pleasing illustrative material. It is important to keep in mind the other catalogs a family is likely to have from competitor schools when one's own arrives on the scene. The cover should stand out and make a strong, immediate impression if it is to effectively influence the reader to open the piece up and begin reading.

Schools should avoid using illustrations on covers that are difficult for the reader to understand. One school used for its cover a graphic of two students standing on a sculpture. The colors and rendering of the graphic are such that the cover takes on a surrealistic, dream-like quality, transmitting a message of strangeness to the reader.

A similar approach, but one used successfully, is by Concord Academy (MA), which uses a mezzotint of one of its historic buildings to create a mood of place and time on its catalog cover. Concord, Massachusetts is a town both of literary and historical significance, and one gets a sense of antiquity and the importance of setting through this cover illustration.

CONCORD ACADEMY



Publicity from Printing

Reminding one that public relations is a complex, interrelated set of communications, the Concord catalog was the source of some unexpected and unusual publicity for the school. The paper merchant who recommended the stocks the catalog was printed on entered the finished piece in a competition sponsored by Potlatch, a major paper manufacturer. The catalog won an award against a number of commercial pieces and has been distributed by the company as an example of fine printing on one of its mid-range cost papers. While most schools will never win awards for their publications, they still must face the most important jury of all, the audience they are trying to influence. How many schools have taken the time to conduct a market survey at this point in the cycle by asking people their reaction to given publications? Now is the time, before producing new materials that have the potential of falling wide of the mark.

Assessing the Cover Photo

One trap schools often fall into when planning a cover is choosing photographs of students who are well liked or otherwise exemplary citizens of the institution. The familiarity and foreknowledge of who's who in the photos should not take precedence over the technical excellence of the photos. Is the composition well balanced, is the lighting good with a range of tones from light to dark, are the people in the photograph relating to each other, do they engage the attention of the reader? Schools should save their superstars for newsletters or magazines in which there is chance to editorialize about achievements. The audience looking at a recruitment piece will relate not to exactly who is being pictured but how people are pictured and what the composition of the photos says about the institution.

Putting Photography on the Calendar

Planning for photography should be on the agenda for public relations meetings, when those in charge of public relations sketch in events, story ideas and other communications for the coming year. It is not enough to rely on the yearbook staff to document school life or to haphazardly shoot special events and expect that a school will have adequate material on hand to illustrate its publications. The interaction of students and students, students and teachers, classroom activity, extracurricular activities, the school facilities and so forth must be caught on film on a regular cycle and then carefully and systematically printed and filed for future use. (Appendix XVI).

Schools may be able to release a talented faculty member from some teaching duties to take on this important responsibility, or they may have access to a photography student at a nearby college or university. Perhaps there is a professional parent or graduate who

is willing to give this service as a gift to the school. If not, a school should hire a professional and plan that person's time on campus carefully to maximize the investment. Costs range from \$250 per day to \$750 per day + costs for film, processing, printing and out-of-pocket travel expenses. Schools should try to convince the photographer to allow the institution to retain ownership of the negatives to become part of the permanent pictorial archives. In this way, when prints are needed next year or the year after, the school can get the printing done on its own without having to go through the photographer (do give credit in the publication). At the same time the schools will be building a visual history of the institution.

One Recruiting Piece or More?

One effect marketing research has had on some schools is to move away from the all-information-under-one-cover approach in recruitment publications to creating a set of pieces directed at specific audiences and/or addressing specific topics. One configuration is a viewbook with carefully written, concise text about the personality of the school, its mission and the kind of people it serves, accompanied by testimonial statements about how individuals feel concerning their experience at the school. These statements can be powerful stuff. The viewbook is planned for a two-year or three-year life span and generally includes an abundance of excellent photographs, a map and directions on how to get to the school and a campus plan (to help people get around once they are at the school).

The viewbook is supplemented by general information updated annually—course offerings, a calendar, a list of faculty and trustees, academic, sports and other awards, the daily schedule and so forth. Sometimes this information is in a separate piece, sometimes it is bound into the viewbook, or it can be tucked into a flap or pocket in the back of the viewbook. Careful consideration should be given to making these pieces coordinate in color, type style and general layout, and whoever is in charge of producing these materials better understand that they will have to work on them over the summer if the publications are to be ready to use at the opening of school. Schools simply cannot afford to make do with last year's materials when answering a family's inquiry in October or November. There are only so many times one can blame the printer for what in fact is an absence of planning in-house.

What if the School is Full?

Some schools who are enjoying maximum enrollment worry that it is "false advertising" to spend money on nice recruitment pieces when they have only a few places open and do not wish to stimulate applications only to disappoint a family by saying "No room in the inn."

They should keep in mind, however, that a viewbook or catalog by itself will stimulate very few, if any, applica-

tions. It is but one tool used in a coordinated sequence of various kinds of communications, face-to-face and on the telephone. It is important for a school to document itself in print. Schools are corporate entities with histories and with important missions. If a school expects to have a presence in the community (both in the neighborhood and in its community of colleagues), it must substantiate itself to the public in a professional looking publication or set of publications.

The exercise of framing a mission statement and finding ways to illustrate it through photographs or artwork helps to bring different elements of the school closer together in their understanding of what they are working toward both today and in the future. The feeling of pride that grows from the inside will project beyond the school's walls and make a positive impact on the world beyond.

When to Publish

The best time to plan a major publication for recruitment is when the school is in a healthy state, not during a moment of crisis when the budget is threatened due to poor retention of students or other problems. Just at the time a school thinks it can postpone a publication project "because things are going so well" is when it should be planning a strategy on how best to market the school to the audiences it wants to reach.

Schools must step back from their publications and analyze their objectives for producing them in the first place. Whom do they wish to reach with a given piece, and what would they like to have happen as a result of someone reading the piece? When and how will they distribute a publication or series of publications? Who should be involved in helping draft the text? Should a publication be accompanied by a letter? Should it be mailed first class or bulk rate?

New Publication Ideas

Some schools are producing information flyers with built-in response devices to generate inquiries from new target audiences. All a reader has to do is tear off a business-response postcard and mail it back for further information on a school's program. Such a direct-mail approach may help increase the applicant pool and stimulate greater name recognition in the community. A similar piece is a poster with a pad of postcards attached, providing the reader with an easy way of getting in touch with the school. Such publications should be planned in conjunction with the advertising program and should be followed by direct contact from the school. Information flyers can be produced on a modest budget and can be distributed in large numbers in the community or when an admission officer is on the road.

Collective Recruitment Publications

Schools may wish to join together with others to produce a joint piece which will give each participating school visibility in the wider community and a contact for further information. Such a collective strategy has positive public relations value for all independent schools and helps individual schools get the word out without having to make a major expenditure. *A Resource Guide on Collective Enrollment Strategies* and an updated addendum of regional efforts available through the Boarding Schools Program provides useful information on how schools can work together to produce a group communication.

Being Market "Wise"—Putting the Publication to Work

Schools have begun to think about nontraditional ways to distribute pieces produced for recruitment purposes. When an institution has a new piece it is proud of, mileage can be made with a mailing to alumni/ae with a covering letter from the head saying "We thought you would like to know about the exciting things going on at your alma mater in 1985. As you will see, many wonderful new programs have been introduced, but the flavor of the place and the fine caliber of the teachers is just the same as when you were here. If you know of a family who might be interested in hearing more about what we're doing, please pass this along or call us to get in touch." Such a mailing allows a school to communicate with graduates in a way that does not appeal for money.

Schools should also pay more attention to internal distribution. How many faculty members are given copies of new recruitment pieces as soon as they are released? The faculty is likely to pass information on to members of the community if they have access to the materials. Also, "seeing oneself in print" is a source of pride and satisfaction *within* the school community.

Recruitment pieces also become part of a school's press kit and can be used effectively by development officers in proposals to foundations and top donor prospects and by phonathon volunteers to help them have ready access to current information about what is going on at school.

Every School Publication is a Recruiting Tool

Just as there may be new ways to use recruitment pieces for "nonrecruitment" purposes, so too a school can use magazines, newsletters and annual reports to enhance its recruitment efforts. Articles in the school periodical can help clarify a school's image and bring people up to date on programs offered. If in its image analysis work a school discovers that the public perceives it as being too "artsy," the school may choose to

run some stories on science (or math) to help balance things out. One can find out who among the alumni/ae are involved in science as a career and include a profile or two.

If one's main competition is the local public schools and they are deficient in music and drama, a school can underscore its strengths in these areas in the newsletter or magazine, showing off the positive ways in which it is different. Schools should send periodicals to candidates' families as another way of communicating and to inform them of the year's activities; don't wait until a new student has come aboard to put the family on the mailing list.

Annual reports provide schools with a wonderful opportunity to thank donors and volunteers and also to let prospective families have a glimpse at the people who really care about the institution. They will be favorably impressed by the trustee list and others who contribute both time and money to give the school that margin of excellence in programming which cannot be supported by student enrollment alone. Such early lessons in voluntary support will pay off later when it comes time to educate first-generation independent school families as to a school's expectations beyond the obvious tuition payments.

Supplementing Publications with a Media Presentation

The considerations that go into the execution of a successful publication are the same as for a new slide program, videotape or film. A school needs to determine how it would use such a production and how the finished presentation fits in with the overall public relations program. The biggest difference between publications and A-V is the nature of the media themselves as message carriers. Audiovisual productions are much more effective at evoking emotional responses than they are at getting across facts and figures. In a slide show or videotape, quick impressions about the flavor, setting, energy and style of an institution can be made effectively, whereas lengthy curriculum discussions and college admission statistics will fall flat.

Many audiovisual programs designed to market a school to prospective students employ testimonial statements from students, faculty, graduates and parents. This material is gathered through interviews which are taped. The tapes are transcribed and edited and then spliced together in a cohesive statement. In some instances a narrator makes comments that bridge topics as the story moves along. In other programs, material from interviews is used as a basis for writing a script which is then narrated by a professional voice-over. Music and sound effects are added to increase the sensory impact of the presentation.

Whatever the final format, schools should understand that producing an audiovisual program starts with a script, not with a few years' accumulated slides. The photography is done to fit the script, not vice versa, and file shots are used only as fillers.

Planning an A-V Program

In planning for an audiovisual program, schools need to consider expenses—costs run from \$15,000 to \$50,000 for a professionally produced 12- to 15-minute show; how the show will be used (at open houses, on the road, in the waiting room at school) and who is going to carry and operate the hardware; what the specific purpose of the show is (to supplement remarks by an admission officer or to “replace” them, to reintroduce alumni to the school of today); what the lifespan of the program will be (technical considerations concerning the flexibility of the format for possible updates should be kept in mind); and who is going to do the work.

Again, it would be prudent for a school to review and critique other schools’ programs before launching into one of its own, and a school should think very carefully about whether a “homespun yarn” will do the job or to bring in professionals to take on the project. An individual or small committee of school staff should be closely involved in all phases of the work if an outside firm is used; the school should not give over its ownership of the production. A long lead time is needed to plan for a program, both in terms of budgeting and in terms of production—a full school year should be available for new photography to show the school in all its seasons.

A Joint A-V Project

Here is another opportunity to stretch the dollar through a joint effort. For instance, six Hartford (CT) area boarding schools have pooled their efforts to create a generic recruitment slide show. This show, with materials from each individual institution, is taken on the road and shown in open houses in targeted cities across the country. Two admission officers (on a rotating basis) represent the participating schools, and they report that the cooperative venture has stimulated business for all and that the setting aside of traditional competitiveness and petty jealousies has enhanced everyone’s professionalism in the recruitment of students.

Boarding Schools is beginning an intensive study of audiovisual materials for school use and can serve as a resource for schools who are thinking about adding this important tool to their communications repertoire.

Who Puts It All Together?

No matter what the publication or production, joint effort within the school should go into its making. The isolation of one office or department from another in planning the school’s image making will show in the final result, and one will end up with fragmented or blurry statements about who and what the school is all about. Stationery items, annual appeals and reports, admission pieces, advertisements, magazines, newsletters and slide shows are all part of a larger effort to secure the future of a school through effective communication based on tried and true marketing techniques.

More than likely a school can do most of the editorial work necessary to produce an effective recruitment piece or pieces. Typically the writing is done by faculty division or department heads. General information, such as the history, educational philosophy and college placement record, is supplied by the admission director and/or head. One person with editing experience should coordinate the total manuscript to guard against a toneless, writing-by-committee text. Development officers can bring a fresh eye and their experience with the school constituencies to recruitment copy. They should be involved throughout the process.

Any major changes in program or facilities should be anticipated in the copy to avoid producing a new piece that will go out of date soon after coming off the press. For instance, recently one school wisely postponed producing a new three-year viewbook until the trustees ratified recommendations from the long-range planning committee which may mean making the sixth grade part of the middle school rather than the lower school.

Taking the Reader’s Interests to Heart

Throughout constructing a new text, careful thought must be given to public relations problems and pluses, and the school should take care not to overstate or exaggerate in an attempt to lure families to apply. A school must be able to deliver what it promises in print or risk being sued for false advertising.

Those working on the text must also remember that the finished product will fall flat with its audience if it is not written in a way that anticipates their questions, concerns, needs and motivations. It is important to keep in mind the ever growing numbers of first generation independent school families applying to schools; these people may have only a vague or incomplete understanding of what independent education is all about let alone an interest in a specific institution.

The admission process should be made as unthreatening as possible, in this regard. People should feel welcomed to a school, not just when visiting, but in the publications as well. Many schools forget to take a critical look at their application forms when updating or creating new recruitment publications. Questions such as “college or university attended by father/mother,” “religious affiliation” and even “relatives who have attended the school” may send out strong negative signals about a school’s commitment to enroll students from diverse backgrounds, and the mother or father who has not attended college and has no relatives connected with the school may fear that these “inadequacies” will harm a child’s chances of being accepted. Schools should ask only for the information they really need to support the admission process—there is time later to find out family information on enrolled students that will be helpful to the development or dean’s office.

Bringing on the Pro's

Because a school's publications cannot afford to have the loving-hands-at-home look, the institution may be well served by working with a professional graphic designer in assembling new publications. The technical know-how and production contacts, as well as the creative touch that is the province of the designer can combine to put that carefully worded text and new photography into a smashing graphic "package" in ways that would be difficult or impossible for a school staff member to accomplish.

The school should interview printers, agencies or freelancers offering design services to go over a prospective project. Preparing in advance for such meetings will enhance a school's chances of selecting the most appropriate professional for the job. The selection committee should have established the purpose of the publication; the quantity needed; how it will be distributed and over what period of time; budgetary constraints; when the publication is supposed to be delivered; graphic preferences. The committee should be specific in outlining what the school can provide (text, drawings, map) and what services the designer should provide (arrange for photography, design and paste-up, liaison with printer). Once a decision is made to use an outsider, a letter agreement contract outlining services, costs and schedule should precede the actual work. The same care in planning should be used in selecting a printer for a specific job for those schools who are able to do their own design work in house. (Appendix XVII).

When the Job is Done

Once a publication is released for distribution, the school should assess its success from a number of standpoints: Did it come out on time? Is the quality of the printing and paper satisfactory? Did the job come in on budget? Is it being met with compliments by the audiences receiving it? Is the publication stimulating the desired response or action on the part of the audience? If the school had it to do over again, what would it change in the publication and/or the process?



the elmwood franklin school



A CAMPAIGN FOR
KINGSWOOD—OXFORD

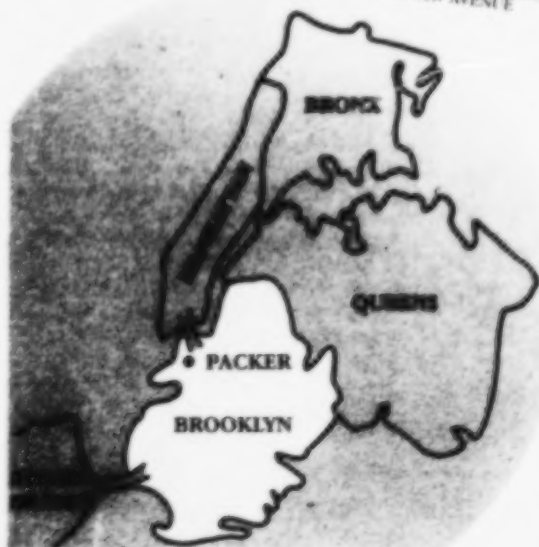
Conclusion

Schools traditionally have shied away from "doing" public relations, publicity, advertising and more than the bare bones necessities in publications and printed matter. Schools also have responded negatively to marketing principles and terminology as being a lexicon of commercial mumbo jumbo appropriate for selling cars and cosmetics, but certainly not for advancing the mission of a nonprofit educational institution. The fact is, however, that schools ARE doing marketing and public relations every day they are in operation from the first day of the first year the doors are open indefinitely into the future. Are the current efforts really supportive of the ultimate mission of the school, or could they become more efficient, more complete, more unified and better executed? Very few schools can rest comfortably with the practice of putting out the same thing they did last year to keep enrollments full and secured for the years to come.

The Marketing Handbook is designed to serve as an introduction and a resource guide for those schools wishing to strengthen their bonds with the community, to enhance their potential to serve a varied student body and to enlarge their resources—people, program, plant and purse. Putting the theory to practice offers school administrators and faculty, their friends and supporters, an opportunity to exercise the ingenuity and resourcefulness that have long characterized independent education. It is hoped that some of the information contained in these pages will prove useful and interesting to school "marketers" and that they will in turn help improve upon this publication by submitting their ideas and suggestions to the Boarding Schools Committee for possible subsequent editions.

Appendix I School Maps

Directions to Packer



SUBWAY STOPS SERVING PACKER:

- Borough Hall: Lines 2, 3, 4, 5
- Court Street: Lines M, RR
- ▲ Jay Street & Borough Hall: Lines A, CC, F, JFK Express

TRAIN TRAVEL TIME (APPROX.) SCHOOL DAYS TO PACKER FROM:

UPPER MANHATTAN	45 MIN.
LOWER MANHATTAN	25 MIN.
BAY RIDGE	30 MIN.
PARK SLOPE	20 MIN.

Directions to Cheshire Academy

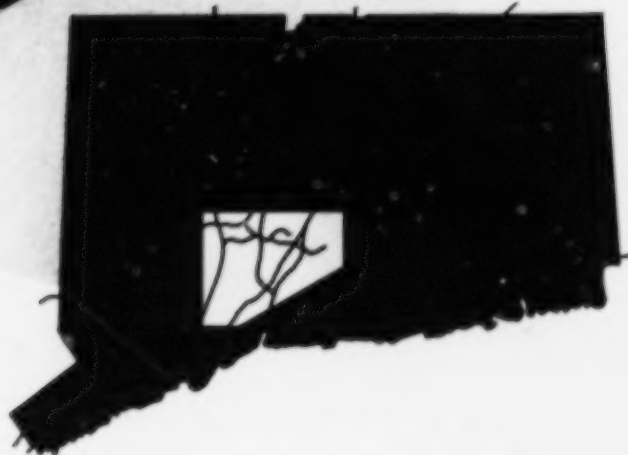
From Danbury—West Area:
Follow I-84 East to Exit 26 (Rte. 70)
to Cheshire app. 4 miles.

From Massachusetts-Hartford Area:
In Hartford, follow I-84 West to Exit
29 to Rte. 10.



From Providence—East Area:
Follow I-95 West to junction of I-91
in New Haven. Take I-91 North to
Exit 10 (Cheshire-Hamden) Turn
right on rte. 10 to Cheshire, (appro-
ximately 5 miles)

From New York City Area:
I-95 to Milford (CT) Exit 38 to Mer-
ritt Parkway, to Exit 61. Turn right
(Whitney Ave.) Follow Whitney Ave.
(Rte. 10) North approximately 8
miles. OR I-95 to New Haven & take
I-91 North.



Appendix II

Questionnaire to Parents with Students Presently Enrolled

- NOTE:
- Make compatible for tallying purposes (multiple choice questions best)
 - Test questions before sending out
 - Do not ask respondents to give their names (can code to determine respondent)
 - Ask Boarding Schools Committee to send their similar questionnaire for exact format

PART I

1. In what community do you live?
 - a. If day school, list particular suburbs (i.e. Cambridge, Somerville, Brookline, etc.)
 - b. If boarding school, start with local area and then expand (Westchester County, New York City, Connecticut, Massachusetts, South, West, etc.)
2. How many years have you lived close enough to send your child here? (only appropriate for day school)
3. How many children do you have?
4. Regarding your children:
How many now attend our school?
How many are too young to attend our school?
How many could now but do not? Do the children go to a public school? Do they go to another private school?
How many of your children have graduated from our school?
5. In what grades are your children at our school?
6. Did either parent attend an independent school/boarding school?
7. What is the highest educational level attained by each parent?
8. Total family income from all sources:
9. Is this a single parent household?
10. Has either parent been married to another person?
11. Which of the following best describes the work each parent does? (List occupations including homemaker, retired, other).
12. What is the race/ethnic group/national origin of your child/ren?
13. (In the case of a secondary school) Which best describes the last school your child attended before coming to our school? Public, parochial, independent schools ...

PART II

1. What prompted your interest in our school?
Family ties, friends with children here, references from previous schools, references from educational consultants, school directories, dissatisfaction with public schools, special needs for my children, extended day programs, advertising, other:
2. How important were each of the following factors for enrolling your child/ren at our school? Mark each reason on the following scale:
(1) very important (2) important (3) secondary consideration
(4) not important (5) negative consideration
 - a. academic program
 - b. support services: counseling
 - c. better chance for admission to college of choice (secondary school only)
 - d. athletic program
 - e. fine arts program
 - f. performing arts program
 - g. small classes
 - h. parent involvement with school (day school)
 - i. campus and facilities
 - j. school community
 - k. diversity of student body (religious and ethnic)
 - l. quality of faculty
 - m. head of school
 - n. innovative curriculum
 - o. dissatisfaction with public school (or local options for boarding school)
 - p. concern for value development
 - q. the fact the school is coeducational (or single sex)
3. Now that your child has been at our school, to what degree have your expectations been fulfilled? Mark each item on the following scale: (1) very satisfied (2) satisfied (3) disappointed (4) very disappointed (5) no basis for judgment - Use same categories as in Question 2 -
4. How do you consider the communication between you and the school's faculty and administration?
5. What suggestions or recommendations do you have for the future directions of our school?

Developed by Marjo Talbott for use in the Marketing Workshop, NAIS 1984 Annual Conference.

Appendix III Accepted Student Questionnaire

- NOTE: ● Might want to get parents' reactions instead
 ● Make compatible to computer for tallying purposes
 ● Test questions before sending out

THE PREPARATORY SCHOOL CANDIDATE'S REPLY FORM

NAME: _____ DATE: _____
 GRADE IN SEPTEMBER _____

- _____ I accept admission to Preparatory School.
 _____ I decline admission to Preparatory School. I intend to enroll
 at: _____.

1. Please list in order of preference, the schools to which you applied. Circle those to which you were accepted and note amount of aid, if any, offered.

	<u>Name of School</u>	<u>Applied for Aid</u>	<u>Amount Offered</u>
a.	_____	yes/no	\$ _____
b.	_____	yes/no	\$ _____
c.	_____	yes/no	\$ _____
d.	_____	yes/no	\$ _____
e.	_____	yes/no	\$ _____

2. Below are usual sources of information about an independent school. For those which provided you with information on The Preparatory School, please indicate how they influenced your desire to attend by the following scale: (1) important factor (2) factor (3) no impact (4) slightly negative factor (5) negative influence (6) never had contact with this source.

- a. present Preparatory School students
- b. alums of the school
- c. educational counselor
- d. private school handbook
- e. admission brochure
- f. slide presentation
- g. open house
- h. campus visit
- i. tour guide
- j. local newspaper coverage
- k. follow-up correspondence with admission office
- l. interview with admission director
- m. "Boarding School" fair
- n. financial aid policy
- o. present school teacher or counselor

3. In order for us to better assess what differentiates Preparatory School from other private schools, please rate the school on the characteristics listed in Column A. If you have decided to go to another school, please rate that school on the same characteristics in column B. Use the following scale: (1) excellent (2) very good (3) good (4) fair (5) poor

COLUMN A

COLUMN B

- a. academic program
 - b. support services: counseling
 - c. better chance for admission to college of choice
 - d. athletic program
 - e. fine arts program
 - f. performing arts program
 - g. small classes
 - h. parent involvement with school (day school)
 - i. campus and facilities
 - j. school community
 - k. diversity of student body (religious and ethnic)
 - l. quality of faculty
 - m. head of school
 - n. innovative curriculum
 - o. dissatisfaction with public school (or local options for boarding school)
 - p. concern for value development
 - q. fact that school is coeducational (or single sex)
4. If you have agreed to come to Preparatory School, please list the three most important reasons for choosing us.
- a. _____
 - b. _____
 - c. _____
- If you have decided to go elsewhere, please list the three major reasons for not choosing Preparatory School.
- a. _____
 - b. _____
 - c. _____
5. What criticisms (if any) do you have of the school, and/or its admission process? (Please be specific)

Developed by Marjo Talbott for use in the Marketing Workshop, NAIS
1984 Annual Conference

Appendix IV

General Components of a Marketing Audit

The Education Industry's Macro Environment

Economics - Demographic:

1. What does the institution expect in the way of (e.g.) inflation, labor supply, loan availability in the short, intermediate, and long run?
2. What effect will forecasted trends in birth rates, and population demographics have on demand?

Technology:

1. What major changes are occurring in way people are educated?
2. What kinds of alternative methods might challenge the way we educate in the future?

Political-Legal:

1. What laws are proposed that may affect marketing strategy and tactics?
2. What federal, state, and local agency actions should be monitored? What is happening in the areas of educational loans, teacher competency requirements, admission testing, etc. that is relevant to marketing planning?

Social-Cultural:

1. What attitudes is the public taking toward education and toward private education in particular?
2. What changes are occurring in consumer life styles and values that have a bearing on the school's target markets and marketing methods?

Task Environment

Markets:

1. What is happening to market size, growth, geographical distribution and profits?
2. What are the major market segments? What are their expected rates of growth? In which segments are the best and worst opportunities?

Customers:

1. What criteria are used by our customers in selecting education services? Which criteria are more important among different segments of our customers?
2. What is the process by which different customer segments make their decisions?
3. What special needs are evolving among buyers in the market?

Competitors:

1. Who are our major competitors? What are the objectives and strategy of each major competitor? What are their particular strengths and weaknesses?
2. How does the market rate us in comparison to our competition?

Distribution:

1. Are there other distribution channels by which to bring our product to consumers?

MARKETING STRATEGY AUDIT

Marketing Objectives:

1. Are the institution's objectives stated and do they lead to marketing objectives?
2. Are the marketing objectives stated in a form to guide marketing planning and measurement?
3. Are the objectives appropriate given the institution's competitive position?

Strategy:

1. What is the core marketing strategy for achieving the objectives?
2. Are adequate resources budgeted to accomplish the marketing objectives? Are they all allocated optimally?

MARKETING ORGANIZATION AUDIT

Formal Structure:

1. How is marketing currently organized in the institution?
2. Do those responsible have sufficient authority, time, training, etc. to handle all marketing responsibilities?

Functional Efficiency:

1. Are there good communication and working relationships between marketing and recruiting groups?

Interface Efficiency:

1. Are there problems between marketing and those providing the institution's services?
2. What about marketing and other organizational components?

MARKETING SYSTEMS AUDIT

Marketing Information Systems:

1. Is there a system for obtaining, interpreting and producing timely information about changes in the marketplace?
2. Has a research agenda been established to fulfill specific information needs? Is this research being adequately used by decision makers?

Marketing Planning System:

1. Is the marketing planning system well conceived and effective?
2. Are sales forecasting and evaluation of promotions being carried out?

Marketing Control System:

1. Are reviews of progress undertaken in order to insure that marketing objectives are being attained?
2. Is the profitability of different services, markets, territories, etc. being assessed?
3. Are various marketing costs examined periodically?

New Service Development:

1. Is the organization well organized to generate, gather, and consider new product/service ideas?
2. Does the institution do adequate research and business analysis before investing in a new idea?

MARKETING PRODUCTIVITY AUDIT

Productivity Analysis:

1. What is the profitability of the institution's different products/services, served markets, territories?
2. What would be the profit consequences of entering, expanding, or contracting various business segments?

Cost-effective Analysis:

1. Do any marketing activities seem to be excessively costly? Can cost-reducing steps be taken? In what areas can marketing expenses be increased to enhance revenues?

MARKETING FUNCTION AUDITS

Product/Services:

1. What are the objectives of the various products/services?
2. Are there specific products/services that should be phased out? Are there products/services worth adding?
3. What changes in our present products/services would better the needs and wants of our target markets?

Price:

1. What are the pricing objectives, policies and strategies?
2. How do customers view our prices in comparison to competitors in terms of value received?

Distribution:

1. What are the distribution objectives and strategies?
2. What barriers does the organization create that prevents greater use of services?
3. Should the organization alter its calendar, service hours, or service locations to broaden appeal?

Promotion, Advertising, and Publicity:

1. Have we been as creative in selecting advertising media as we have in developing copy?
2. Do the advertising themes represent what the institution wants said or what the consumer wants to hear?
3. Is there a well-conceived publicity program?
4. How is the promotional budget determined? Could advertising expenditures be more effectively spent in other marketing activities?

Note: Rarely is it advisable for the client to undertake an audit on its own. It is typically recommended that the audit be conducted by an outsider whose views are more objective, and solutions creative.

Jeffery T. Wack, Ph.D., Marketing Sciences, Incorporated, 246 Church Street, New Haven, Connecticut 06510. Developed specifically for this Handbook - Spring 1985.

Appendix V

Outside Marketing Resource List

The following resources are offered to help schools with their marketing efforts. This list is by no means complete and is intended only to represent the variety of resources available. Inclusion in this list does not imply endorsement by Boarding Schools or The National Association of Independent Schools.

AddVenture Network, Inc.
1380 Lawrence Street, Suite 640
Denver, CO 80204

A membership organization for nonprofit enterprises, AddVenture's purpose is to teach its members to earn income in entrepreneurial ways. It provides a guide book, a quarterly magazine, a data base listing all earned income ventures nationwide, telephone consulting, seminars, conferences, publications, access to a venture capital fund, brokerage service and, at extra cost, on-site consultation.

Barton-Gillet
17 Commerce Street
Baltimore, MD 21202

Barton-Gillet pioneered institutional marketing and strategic planning to help secondary schools, universities, medical centers, museums, and corporations to better positioning with their key constituencies. It offers complete marketing services.

Boarding Schools
18 Tremont Street
Boston, MA 02108

A membership organization of 230 schools which promotes independent boarding education to the public at large. Publishes annually newsletters, directories, and targeted brochures, reaching approximately 300,000 people in a year. Develops marketing studies and admission surveys to support individual schools recruitment and marketing efforts.

Browning Associates
Newark, NJ 07104

This consulting agency provides services in management, general development, annual fund, capital gift programs, deferred gift programs, constituent and public relations, publications, office systems, special educational services.

Center for Entrepreneurial Studies
Graduate School of Business Administration
New York University
100 Trinity Place
New York, NY 10006

The Center has been recently organized to serve for profit and nonprofit interests, as well as academics. Research, publications, courses and seminars are parts of the program. There is an ongoing Institute for Not-for-profit Entrepreneurship, which has its own mailing list.

Carol L. Cheney
147 Woodlawn Street
Hamden, CT 06517

Freelance consultant for schools and other nonprofit institutions needing help on the promotion phase of marketing. Service includes publications and planning; writing, editing, designing publications/advertisements for admission, development and special events; coordination of school corporate identity.

Council for Advancement and Support of Education
Suite 400
Eleven Dupont Circle
Washington, DC 20036

CASE offers programs and services to colleges, universities, and independent schools to build public understanding, step up the level of alumni involvement and support, strengthen communications with internal and external audiences, improve government relations, and increase private financial support.

George Dehne
Admissions Marketing Group
131 State Street - Suite 329
Boston, MA 02109

Admissions Marketing Group provides research, marketing strategies, and public relations programs for colleges and universities throughout the nation.

Gehrung Associates University Relations Counselors, Inc.
222 Main Street
Keene, NH 03431

Gehrung Associates is a specialized communications, marketing, and public relations firm that services only educational institutions -- schools, colleges and universities -- and their various professional associations and organizations.

Georgia Irvin and Associates
4701 Willard Avenue - Suite 227
Chevy Chase, MD 20815

This educational consulting group, founded by a highly respected admission director, offers consultation and advice for families interested in pre-kindergarten through secondary schools, summer programs, and college. The staff also helps independent school professionals develop sound practices in admission and financial aid.

Gonser Gerber Tinker Stuhr
105 West Madison Street, Suite 402
Chicago, IL 60602

This consulting firm assists client institutions build and strengthen development programs with major long-range and short-term goals for obtaining: greater understanding and acceptance from the publics most vital to the institution; increased philanthropic support for current operations, capital growth, and long-term financial viability; student enrollments of the size and type desired.

Grizzard Advertising, Inc.
1144 Mailing Avenue, S.E.
Atlanta, GA 30315

This is a direct-mail company which solicits funds and advertises products and services for both nonprofit and for-profit customers. It publishes a quarterly magazine.

Independent School Management
1316 N. Union Street
Wilmington, DE 19806

ISM is a management support firm which publishes a monthly four-page advisory letter, dealing with wide-range independent school management problems; sponsors numerous workshops and seminars; and provides consultation to schools on development, admission, and long-range planning issues.

Johnson Associates
800 Roosevelt Road - Suite 17, Building A,
Glen Ellyn, IL 60137

Johnson Associates is management and marketing consultant firm dealing with nonprofit organizations, namely colleges and universities.

Marketing Sciences Corporation (A Division of Frank N. Magid
Associates, Inc.)
One Research Center
Marion, IA 52302

Marketing Sciences Corporation specializes in marketing analysis and communications development. The firm offers a full range of research services including focus interviewing, telephone surveys and special advertising and promotion research. Consulting services are available to support admission, development, and public relations.

Marketing Sciences, Incorporated
Jeffrey T. Wack, PhD
246 Church Street
New Haven, CT 0651

The firm provides marketing audits, planning and research to service businesses, including nonprofit institutions. It conducts numerous seminars and workshops on marketing strategies.

Marts & Lundy, Inc.
Meadowlands Corporate Center
1200 Wall Street, West
Lyndhurst, NJ 07071

Full range of services and techniques, full-time resident direction and/or counseling with client staffs including studies, direction of capital fund-raising programs; counseling on development programs, annual funds; writing and design services for brochures, catalogs; training of new development officers.

National Association of Independent Schools
Admission Services
18 Tremont Street
Boston, MA 02108

NAIS is a voluntary association of over 1,000 independent schools across the country and abroad. Among its services, it supplies schools with statistics, workshops, annual conference (5,000 attend), handbooks, and job clearinghouses. One of its major departments covers admission and financial aid issues for elementary and secondary independent schools.

New Ventures
251 Park Avenue South, 12th Floor
New York, NY 10010

This is a nonprofit consulting firm which assists nonprofit organizations to discover, develop or make use of opportunities to earn income. This has been done through developing salable products or services, royalty and various other arrangements in addition to offering services to individual organizations.

Public Relations Society of America, Inc. (PRSA)
845 Third Avenue
New York, NY 10022

PRSA provides public relations services for institutions, organizations, associations, and executives. Services include the Information Center, the Research Information Center, public relations publications, and the Foundation for Public Relations Research.

Whitney Ransome
Admission Consultant
228 Main Street
Concord, MA 02181

Previously an admission director and the director of the NAIS Admission Workshop, she is now an admission consultant to schools. She does marketing studies, assesses admission operations.

Sanford Roeser
Box 101
Northfield, MA 01360

Previously the program director of SSATB and the School Scholarship Service, he has developed an admission counseling service to assess and assist individual schools admission operations.

Secondary School Admission Test Board
20 Nassau Street
Suite 314
Princeton, NJ 08542

SSATB's purpose is to provide a secure, international, admission test program to evaluate candidates and to professionalize school admission officers. It produces newsletters, sponsors an Annual Meeting, and the director speaks extensively at major educational conferences.

The Society for Nonprofit Organizations
6314 Odana Road, Suite 1
Madison, WI 53719

This agency provides comprehensive support services to nonprofit organizations of all kinds.

Temple, Barker and Sloane, Inc.
33 Hayden Avenue
Lexington, MA 02173

The company offers a broad range of consulting services to clients in public and private sectors, including proprietary software for computer-aided instruction and systems for administrative and academic planning.

Wharton Entrepreneurial Center
Steinberg-Dietrich Hall/CC - Suite 3200
Wharton School, University of Pennsylvania
Philadelphia, PA 19104

Wharton Entrepreneurial Center is both an academic program for students in the business school and a resource for the outside business world. In addition to courses, it offers seminars and institutes for business and nonprofit groups. The Pennsylvania Small Business Development Program is a unit within the Entrepreneurial Center. It supplies management and technical assistance at numerous sites and has produced publications on small business concerns.

Appendix VI

Idea Bank: Spreading the Word — PR/Marketing/Recruitment

RELATIONSHIP WITH PUBLIC SCHOOLS

- Thank teachers for recommendations.
- Send small reprint or description of your school with request for recommendations.
- Give yearbooks to your favorite guidance counselors.
- Join your local guidance counselor association.
- Know real differences between you and local public schools.

Send division head to visit and compare offerings in systematic way.

- Offer public school visiting days during public school vacations. Host a Bring-a-Buddy Day.
- Sponsor art/science/craft show at your school. Solicit entries from local public schools.
- Have a joint play or musical with local public school (especially if you're a single sex school).
- Invite public school principals to your plays, special events. Offer to announce their events, offerings at your school.
- Host a day for local guidance counselors; offer your school facilities for their meetings.
- Join professional organizations in your area. Find out what the concerns are. Make personal contacts.
- Offer Spanish/Greek/language/culture lessons on Saturday for constituency you wish to develop.
- Have your students visit their old public schools.
- Place ads in booklets published by guidance counselors' associations.
- Establish a joint academic program.
- Keep track of referrals for guidance counselors. Make it easy for them to fulfill your transcript requests (send a signed parents' release).

RELATIONSHIP WITH YOUR FEEDER SCHOOLS AND OTHER INDEPENDENT SCHOOLS

- Are you on a first name basis with directors of placement? Invite them to your school. Visit theirs.
- Suggest they host an evening for all local independent schools.
- Have a coffee for directors of local nursery schools. Free up your teachers.
- Share space availability with your "competitors." Make a chart -- help out all newcomers to your town by referring them to schools where spaces are available.
- Publish a joint brochure with fellow independent schools -- make it available to realtors, pediatricians, Welcome Wagon, public schools.
- Use joint testing whenever possible.
- Publish jointly with other independent schools a flyer listing admission practices.
- Publish an announcement of SSAT dates in your local paper -- signed jointly.
- Screen your new students. Why did they pick your school? What did they like, not like in admission process, catalog, atmosphere, etc. Where else were they accepted/rejected?
- Use your older students to do market research or investigate trends for you. Offer it as a spring project.
- Have your students develop a statistical profile of the student body diversity and student profiles to illustrate diversity -- for use in catalogs, press releases, etc.

- Kids lose pencils! Is your name on your school pencils? Or (cheaper) do applicants who are tested at your school take away a pencil with your school's name on it?
- Post weekly visitors' list so current students can greet friends.
- Get list of boarders' hometown newspapers. Send releases re special accomplishments/awards.
- Use older students as "student advisors" during orientation.

RELATIONSHIP WITH YOUR STUDENTS FAMILIES

- Are parents aware of the enrollment needs at your school? Can they supplement your applicant pool? Do you speak at any Parent Association meetings?
- Host a grandparent day -- keep grandparents on bulletin mailing lists or thank them for coming -- send them an anthology of students' work.
- Ask selected parents to be guides at junior day schools.
- Use parents as follow-up to acceptance letters.
- Ask parents to be host family for new parents.
- Can your parents host coffee parties in their neighborhood (or tea or sherry)?
- Do you know your parent body's professions, etc.? Can a parent amateur photographer help you with your slide show?
- Host a Little Sisters/Brothers weekend for younger siblings.
- Ask current parents to host an evening for parents/students of a feeder school when you're on the road.

RELATIONSHIP WITH YOUR ALUMNI

- Prepare a book of profiles of outstanding individuals connected with your school.
- Develop statistical profile of alumni careers.
- Poll alumni about your school's importance to them and their adult careers.
- Invite area alumni to school events.
- Host Graduates' Days -- back to the classroom.
- Ask alumni to talk with students about career opportunities in their field.
- Invite alumni to help school for specific purpose: e.g. Visiting committee.
- Shorten alumni notes and increase features by and about alumni.
- Print on annual fund envelopes or insert in alumni magazine a way to get name of families with children of age ready for your school.
- Develop network of alumni to interview, follow up inquiries, applications, acceptances, distribute applicant list to them, ask them to indicate ones they know or will contact.
- If alumni have helped, be sure to distribute a report of year-end results.
- Send sports schedule each season to alumni.
- Have Alumni Games Day each season.
- Be part of meetings of alumni council as another opportunity to exchange information about admission and enrollment.
- Offer a school counseling program for alumni children (not just for your school).
- Ask recent alumni to respond to questionnaire asking about their preparation for college. Important feedback for you.

Prepared by Nancy Faulkner, formerly with The Park School (MA) and Milton Academy (MA), for The NAIS Admission Workshop, 1978

Appendix VII Fact Sheet

SCHOOL NAME
SCHOOL ADDRESS
SCHOOL TELEPHONE NUMBER

FOUNDED: 1925

SCHOOL HEAD: Joan Doe Smith

ADMISSION DIRECTOR: John Jones

GRADES: 9-12, College preparatory/boarding and day/Episcopal
related/coeducational

ENROLLMENT: Current school year: 201 students (191 boarding, 10 day
students)

Seniors 60

Juniors 55

Sophomores 45

Freshmen 41

TUITION/ROOM AND BOARD: Current school year: \$7850 (plus
miscellaneous fees)

FINANCIAL AID: Current school year: 21% of students receive aid based
on need.

DORMITORIES: Smyth Hall - 15 rooms

Joans Hall - 45 rooms

Hall Hall - 41 rooms

DEPARTMENTS: Fine arts, music, English, foreign languages, history,
math, religion, science, and physical education (riding,
field hockey, lacrosse, tennis, swimming, basketball, etc.).

FACULTY: 26 full-time, 5 part-time.

STUDENT/FACULTY RATIO: 7:1

COLLEGE PLACEMENT: Previous school year: 98% entered four year
colleges, 50% entered Ivy League colleges.

EXTRACURRICULAR ACTIVITIES: Community service, clubs, riding, senior
projects (4 weeks in January), dances, cultural
excursions, concert series, guest lectures,
archaeology trip, nuclear information league.

GEOGRAPHIC DISTRIBUTION OF STUDENTS: Largely Midwest, some Southeast,
Texas, New England, West Coast, South America, the
Orient.

LIBRARY VOLUMES: 14,000

ENDOWMENT: Previous fiscal year - \$3,250,000

Current fiscal year - \$4,500,000 (projected)

OPERATING BUDGET: Current school year - \$2,100,000

CAMPUS: 290 acres (including stables, riding rings, trails, jumping
course, eight tennis courts, indoor pool). Physical plant
value: \$2,900,000.

LOCATION: Town, Missouri, within one or two hours drive of St. Louis.

ALUMNI: 2,700. Annual Giving participation: $\pm$ 50%

DATE/MONTH/YEAR

Appendix VIII Letters to the Editor

A good forum for expressing your views, giving positive exposure to your school, and reaching a cross-section of the public is the Letters to the Editor column. To maximize the chances of your letter being published, keep in mind the following basic guidelines:

- As with a press release, type the letter. Use double-spacing and only one side of the sheet.
- Keep your language simple, your paragraphs brief, and your letter short (200-250 words is usually about right).
- To enhance your persuasiveness, use an objective rather than angry or derogatory tone.
- In your first sentence, refer to the story or column that prompted your letter. When writing to disagree, make your criticism supportive. Start out with an appreciative word or two about the article or reporter.
- Supply facts that may have been omitted. Appeal to the reader's sense of right and wrong.
- End your letter on a constructive note. Make a suggestion or state a hope.
- Mail the original, not a copy. Send the letter to only one publication in a city. Write a different letter if you want to approach another newspaper or periodical.
- Sign your name and address for the editor. Although you may request a pen name for publication, it is preferable to use your own.
- Don't expect your letter to be published immediately, and don't be discouraged if it does not appear. Try again next time an issue arises. The editor's attention and the potential audience you might reach are worth the effort.

For Example: The following letter appeared in the Letters to the Editor of The Dial magazine.

ANTIPOSH

Many people associated with independent schools have appreciated Masterpiece Theatre's fine series "To Serve Them All My Days."

Our one point of concern, however, has to do with Alistair Cooke's summation during which he characterized American boarding schools as posh and country-clublike. Although his intentions may have been to contrast English boarding schools between the wars with American ones today, we are concerned that he may have given a wrong impression of modern American boarding schools.

Independent schools put most of their resources into learning and teaching, provide access to people from all socio-economic levels and backgrounds, and are serious intellectual communities. Neither socially nor academically do they emulate country clubs.

Anne Rosenfeld, NAIS, Boston, MA

Appendix IX
Sample PSA

Observe journalistic conventions

PUBLIC SERVICE ANNOUNCEMENT FOR RADIO

FROM: NAIS
Anne Rosenfeld
617/723-6900

Tax Exempt No.: 042104741

NATIONAL EDUCATION CONFERENCE

Start Date: 2/20/82
Stop Date: 2/27/82
Time: 20 seconds
Words: 45

EDUCATION MATTERS TO EVERYONE. COME EXPLORE EDUCATIONAL ISSUES WITH INDEPENDENT SCHOOL PEOPLE FROM ACROSS THE NATION. REGISTER FOR THE INDEPENDENT SCHOOLS' NATIONAL CONFERENCE, THURSDAY, FRIDAY, AND SATURDAY, FEBRUARY 25TH THROUGH 27TH AT THE DAVID LAWRENCE CONVENTION CENTER. EDUCATION IS THE FOUNDATION OF A FREE SOCIETY.

Prepared by Anne Rosenfeld, NAIS Public Information Office

Appendix X Cable TV



Get in on the last gold rush— cable TV

Cable television is here to stay, reaching daily into more households in more communities. Still little understood by those who don't subscribe to the service, cable is both an important vehicle for free speech and free inquiry and a potential threat to our right to privacy. It is also an exciting and innovative way for community groups, schools, and individuals to reach selected audiences for public relations or community service.

Background. Cable television bears less resemblance to broadcast television than a superficial first glance might indicate. Unlike broadcast TV, cable is transmitted by wire—the “cable” in question—which gives three advantages. First, two-way, or “interactive” transmissions are possible. Two-way television could revolutionize communications. It could also invade the privacy of individual households in

an unprecedented way. Second, the image transmitted by cable is clearer because cables are protected from atmospheric interference. Third, cable offers a vast channel capacity—up to fifty-two channels can be simultaneously available through a single cable.

The sheer number of cable channels allows a rich diversity of specialized programming. Broadcast television's interest lies in providing a few programs for a mass audience in order to charge sponsors more. Cable attracts subscribers, who are its principal source of revenue, by offering many programs, tailored to many smaller, specific audiences. The term for this kind of programming is “narrowcasting.” A narrowcast



can be aimed, for instance, at a group with a special interest, at a defined neighborhood, or at a particular age group. In most communities, individual subscribers choose, and pay for, only those channels they wish to receive.

The technology for cable television has existed for over thirty years, as long as broadcast television has, but until a few years ago, the Federal Communications Commission limited the amount of programming cable operators could receive to retransmit. Cable began to boom when the space age brought satellite-distributed cable channels, such as HBO, into existence. And, in cities and towns throughout the country, competition accelerated among local cable companies vying for franchises.

Cable is currently regulated below the federal level, for the most part by municipalities and occasionally by counties or states. When informed citizens participate and municipalities understand what to ask of franchisers, they can negotiate favorable terms with cable operators. Most cities wired for cable have insisted that a number of channels be set aside for local use. Local programming for local channels falls into two categories: cable company productions called "local origination" programming, and public productions called "access" programming.

Access channels and programming.

Cable television's access channels provide citizens an opportunity to express their views that is unique among mass media. Independent schools may also find access programming a useful outlet to reach the community for public relations, to discuss public policy or educational issues, or to provide an educational service.

Although some local systems offer all kinds of access channels—including local news, sports, music, arts, entertainment, and recreational activities—the usual formats are

commercially by individuals and nonprofit community organizations. Public access programs can range, for example, from a potters' group televising a tour of their kiln to someone editorializing on a public issue. Possibilities are limited only by the imaginations of people in the community. Creative independent schools may find that public access programming has great potential.

Governmental access programming. Public hearings and meetings can be broadcast live and unedited, so citizens can follow the course of their government immediately and at the primary source.

Religious access programming.

Cablecasting local religious services, activities, and educational programs can be live or prerecorded. To avoid national commercial religious programs' monopolizing local religious access channels, some communities require that religious programs be produced locally, or, at least, be sponsored by local religious groups. An independent school with a religious affiliation might consider this type of access programming for its religious education courses, school choir, or ethics class. Cable access is open to all faiths.



public, educational, and governmental. A local cable system may also provide for religious and commercial, or leased-access, channels. Each format is discussed briefly below.

Public access programming.

Usually aired at no charge on a first-come, first-served basis, public access programs are produced non-

Educational access programming. Many schools and colleges already produce and cablecast educational programs, usually academic courses. Independent schools may want to explore producing these kinds of programs for their local communities.

Leased-access programming.

Anyone can purchase time to cablecast a program through leased access. Local producers can lease time and pay for it themselves or they can recruit businesses that want to advertise products to the local community as sponsors.

Producing cable shows. Because most citizens, community groups, and educators are not trained in video production and cannot afford equipment or a studio, many communities have either established "access centers" or required the franchiser to do so. The centers, usually coordinated by a professional, provide equipment, studio space, and instruction for nonprofit and individual producers. They also help schedule channel transmission time and help build audiences for access shows through public relations.

Independent schools should investigate the kind of cable service

in their areas to learn how to gain access to local channels. They should also participate fully in any current local government negotiations with franchisers and in formulating regulations that govern cable. Franchisers, as a rule, provide channels only when cities and towns insist upon them and bargain for them.

Information on local cable services is available from the franchising authority—municipal, county, or state—or from the cable company that owns the local franchise. Areas to explore include program-



ming services, access provisions, access procedures, resolution of complaints, access centers, and rules and regulations.

Information on public policy pertaining to cable and possibilities for cable access is available from two nonprofit organizations—the National Federation of Local Cable Programmers, 906 Pennsylvania Ave. S.E., Washington D.C. 20003, (202) 544-7272; and the Telecommunications Consumer Coalition, Office of Communication, United Church of Christ, 105 Madison Ave., New York, N.Y. 10016, (212) 683-3834 or (212) 683-5656. The first organization maintains a national clearinghouse for local programming, and the second focuses on lobbying and legislation information.



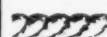
Further reading. *A Short Course in Cable*, by Jennifer Stearns (Office of Communication, United Church of Christ, 32 pp.), provides a general introduction to cable. In addition to an overview of cable history and technology, the booklet tells how to achieve a good franchise, how to organize a community programming center, how to gain access to saturated cable systems, and how to renegotiate a franchise when it comes up for renewal. It was particularly helpful in writing this article. Order from Church Leadership Resources, 1400 N. 7th St., #B, St. Louis, Mo. 63106; \$2.00 per copy, includes postage.

The following publications may be ordered from the National Federation of Local Cable Programmers, 906 Pennsylvania Ave. S.E., Washington, D.C. 20003.

Video Register, 1983-84 Edition. A directory that lists nearly 700 local programming facilities that have the responsibility for managing channels in their communities. Entries include programming hours and content, amount and type of video equipment, number of staff, and operating budget. There are also listings for equipment manufacturers and dealers, publishers, and distributors. (Cost: NFLCP members \$29.95, others \$47.50)

Cultivating the Wasteland. Explores myths, answers questions, and makes unexpected conclusions about the impact of cable on cultural groups. A project of the American Council for the Arts. (Cost: NFLCP members \$18.95, others \$21.95)

Cable TV Renewals & Refranchising. An overview of questions and issues surrounding renegotiation of franchise agreements: financial aspects, two-way cable, privacy, community-access channels, and rebuilding technology. (Cost: NFLCP members \$18.95, others \$21.95)



Creating Original Programming for Cable TV. Essays that cover in detail developments and issues related to producing programs. Contents include "The Players," programming sources, advertising, copyright and royalty issues, and distributing original programming. (Cost: NFLCP members \$18.95, others \$21.95)

Educators & Cable TV. Outlines how sixteen educational institutions work with cable and offers suggestions for school participation in the franchise process. (Cost: \$15.00)

Cable & the Arts. Describes new markets for independent programming and how cable will affect the arts. (Cost: \$10.00)

Libraries & Cable. Surveys libraries that program on cable channels and discusses potential uses of cable TV in library settings. (Cost: \$15.00)

Kids & Cable. Describes children's local cable programs, how to develop children's series, and gives examples of workshop materials from current children's shows. (Cost: \$15.00)

—Prepared by Anne E. Rosenfeld, NAIS director of public information.

Appendix XI

School Press Kits: What They Should Contain

Whether your school's public relations program is active or reactive, it is good practice to keep press kits on hand to give to journalists at a moment's notice. Press kits should contain background information reporters might need in developing a story on your school. Materials on specific events or issues can be added or deleted as needed. The little time and effort required to assemble school press kits usually proves well worth the investment. Here's what to do:

- Use durable folders with side pockets.
- Affix your card with name and telephone number to one of the inside pockets. This will let journalists know whom to call for more information.
- Organize and display your materials in the inside pockets.
- Include the following kinds of things:
 - School catalog and brochures
 - Promotional material
 - History of the school
 - Statement of philosophy, purpose
 - Fact sheet on the school
 - Parents/alumni newsletter and magazine
 - Short biography of the school head
 - Student newspaper and literary magazine
 - School calendar
 - Sports activities information
 - Notices of extracurricular activities
 - Notices of speakers and school events
 - Profile of student body
 - College acceptance record
 - Press releases
 - Reprints of articles published about school
 - Reprints of articles about people at the school
 - Profile of faculty
 - Suggestions for story ideas/lead sheet
- Update your press kit from time to time, and err on the side of including too much material rather than too little.
- Keep some readily available, and see how often you use them.
- Use the press kit as an excuse to call on journalists whose acquaintance you want to make.

Prepared by Anne Rosenfeld, NAIS Public Information Office

Appendix XII Sample Press Release

NEWS

CONTACT: Name of contact to call for more information
(area code) telephone number

FOR RELEASE:
Specific date,
at will, or immediately

NAIS TELLS SCHOOLS HOW TO WRITE PRESS RELEASES THE MEDIA WILL USE

Town, date of press release - Get right to the gist of your press release in the first sentence (lead). It should contain your school's name and location, answer the questions who, what, when, where, and why, and do so in thirty words or less. Example: In an effort to help independent schools obtain publicity, the National Association of Independent Schools (NAIS), Boston, distributed press release guidelines today to member schools throughout the United States.

Even before your lead sentence, your headline should carry an active verb to indicate that something has happened or is anticipated. Write headlines that will catch the attention of the journalist and make him or her read on.

All points should be made in descending order of importance. The narrative should be factual, objective, and hold the reader's interest. State statistics where appropriate.

"Use quotes to liven a release and to give subjective interpretations," says Anne Rosenfeld, NAIS director of public information. "Something personal is always fun to read and can safely make claims and value judgments that don't belong in the text."

Observe certain journalistic conventions. Type your release double-spaced. Keep paragraphs short, preferably one or two sentences. Keep releases concise, one page. If a longer release is necessary, use a second sheet and staple it to page one. Never have a release printed on both sides of the page.

When more than one page is required, indicate the continuation by typing - more - at the bottom of the page. At the top of subsequent pages, put the page number and the total number of pages in the release, e.g., page 2 of 3. Include a word or two at the top to identify the subject of the release in case the pages become separated. Type three "hash" marks (###) after the final sentence of the text to indicate the end of the release.

When should you write a press release? Whenever something newsworthy happens at your school. The arrival of new teachers or administrators, new academic or extracurricular programs, unique classroom techniques, interesting speakers, special accomplishments of teachers, administrators, or students all make good copy.

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Prepared by Anne Rosenfeld, NAIS Public Information Office

Appendix XIII Sample Press Advisory

N E W S

CONTACT: Anne Rosenfeld
(617) 723-6900

FOR RELEASE:

PRESS ADVISORY

To: Education Writers, Reporters, Editors, Producers
Date: March, 1983

=====

Writing about education? Sit in on the most important gathering of the year of the private school sector. Complimentary registration, of course.

Independent schools, often innovators in educational thinking (Remember, they pioneered sex education programs in the '60s and were the first in this country to try the open classroom approach?), will be looking ahead.

Independent school people -- three thousand strong -- from schools throughout the United States and abroad will participate in the 1983 National Association of Independent Schools Annual Conference at the Disneyland Hotel, Anaheim, CA., on March 17, 18, and 19.

What will they be discussing?

- The Politics of Private Education. Interaction among various private school groups and the government.
- Teaching Logical Thinking to Elementary-School Children. A new way to incorporate the teaching of logic into an elementary curriculum.
- Examining the Financial Condition of Independent Schools. A study of data.
- Studies of the American High School - A Synthesis. An overview of current research on the American high school, public and private.

Among the speakers will be:

- David P. Gardner, Chairman, Commission on Excellence. Keynote address.
- David Moursund, President, The International Council for Computers in Education.

Call for more information. And plan to join us.

Prepared by Anne Rosenfeld, NAIS Public Information Office

Handling the Negative Story

What you don't tell can hurt you.

Daniel H. Wells

At a conference for new school heads, a summary statement issued the last day suggested that "two important subjects should be understood: how to raise money, and the 'law' as it affects 'your school.'" A third item in that summary might have been "guidelines for handling the negative story."

Although there is no common blueprint for disasters, it is a good idea to plan ahead for handling a negative story on your campus, because sooner or later it surely will happen.

Unlike colleges and universities, most independent schools have small—or nonexistent—information staffs. The head of the school—the captain of the ship—is expected to account for the school in bad as well as good times.

A negative story is more than just bad news. It is news in print, on television, over the radio, that is written in such a way as to suggest negligence or some other condition that tarnishes the image of the school.

A dormitory fire in the middle of the night that causes student deaths is bad news by any measure. It becomes a negative story of disastrous proportions if the story contains the rumor that no recent fire drills or inspections have taken place.

A suicide occasionally happens in a school, as it does in any community. Add to this tragic loss of a young life the use of drugs or alcohol, and you are suggesting a complete breakdown of structure, whether it is true or not.

Rumors often play a part in creating the negative story, thus damaging the efficiency and morale of an institution. One condition that encourages rumors is secrecy. It is natural for administrators to play safe by keeping uncertain developments close to their chests. But this policy is almost always a bad one because the rumors that fill the void are frequently worse than the published facts.

Daniel Wells is director of development at Loomis Chaffee School, Windsor, Connecticut.

Rumor did its deadly work at a university in the District of Columbia after a maintenance employee forgot to turn off a valve, allowing 5,000 gallons of oil to overflow into the Potomac. Orders from on high were not to disclose the number of gallons "because 5,000 gallons may seem like more than they are to the public."

When a reporter from *The Washington Post* was told that the number of gallons couldn't be released, he said that was all right. "We've got it from the police: 15,000 gallons." Meanwhile, the Associated Press had been in touch with the Navy Department, which was involved in the cleanup, and they were using a 30,000-gallon figure.

It is often wise to take the initiative in phoning "bad news" to the media, because being first with a story makes it possible for you to emphasize positive points. The result is more likely to be a fair and balanced account on page 4 of what really happened than a sensational page 1 news item. Such a procedure also strengthens the school's credibility and is usually reflected in the way the story is reported.

It is important, for the sake of credibility and trust, that the head speak for the school when a negative story is unfolding. Sometimes, however, faculty members become involved, in spite of their best efforts not to. In such a case, the following suggestions may be helpful.

Know the reporter's name and the newspaper or station the reporter represents. Be fair, friendly, and factual. Comment only within your area of expertise. Speak for yourself, not for your colleagues or for the school. Make your answers short and succinct. As a rule, answer only the questions you are asked. Don't go "off the record" without clearly stating when you are off and when you are back on. No reporter likes to hear someone say, "What I've just said is off the record."

A school should have good relations with local newspapers and television and radio stations. Concerned with this issue at

Loomis Chaffee, we arranged meetings with editors at various levels, including the editorial staff of the nearby large daily newspaper. In these meetings, the worries of the school and the policies of the media were reviewed.

We talked about withholding the names of minors in certain tragic situations. We couldn't make a general rule, since deaths should be reported no matter what a person's age, but holding back names of minors involved in crimes is customary and has legal precedent.

Everyone at the meetings agreed that accuracy was essential and that it depended on mutual trust and cooperation. Our head promised to let the paper know about events that would better acquaint reporters with the school.

In reviewing coverage of unfortunate stories about other schools, the editors pointed out the most common mistake—bottling up important facts. They stressed their need to make deadlines and the failure of management everywhere to return phone calls promptly. Our head assured them that the school wanted to cooperate and acknowledged the public's right to bad news as well as good.

In a session on how schools should handle negative stories at a Connecticut Association of Independent Schools conference a year ago April, we found that most schools had no plan at all for dealing with this kind of crisis. Even so, some points worth considering did emerge during the session.

Negative stories do not, for example, mellow with age, and, unlike old soldiers, they do not just "fade away." Failure to deal cooperatively and responsibly with the media during a crisis can have lingering and damaging effects. Our schools are in no position to change the public's seemingly insatiable appetite for the horror story that sells papers. So the story will get coverage.

Information directors should keep a detailed journal of what happens when and of when and to whom news of it is released.

An information desk for prompt answers to questions from parents and the general public is a helpful tool.

Stories should be checked for accuracy as they appear in print or on the air. Because erroneous reporting is not uncommon during an emergency, you have to try to see that inaccuracies are corrected in subsequent editions or newscasts.

Special plans for keeping parents informed are important. An early meeting, to hear the news directly from the head of the school, is advisable, since a letter usually arrives too late to offset rumors.

Finally, bring a few media people into your school once in a while to talk with senior people on a getting-to-know-each-other basis. Don't wait for a breaking story to bring strangers together.

Again, although there is no common blueprint for disasters, heads and school information people can still plan general strategies and resolve not to wait until something unfortunate happens. They can know the local press better.

The problems of the negative story and how well the school and the media know each other and get along can be reviewed every year in a faculty meeting. This subject should also be discussed with students, faculty spouses, and members of the administrative staff, especially those who answer the telephones.

But remember—nothing will ever offset the head's dedication to the school and its people, just as nothing will ever stand in the way of a reporter covering a story. □

Reprinted From *Independent School* magazine, May 1978

Advertising Is Only Part Of School's Overall Marketing

Appendix XV

In the two years since the Sayre School instituted a comprehensive marketing strategy; enrollment has been up 20 percent, retention rate up 4.8 percent, and income from current operations up 33 percent.

By Joel S. Strangis, director of admissions and development
Sayre School, Lexington, KY

(From a speech delivered at the National Association of Independent Schools Conference on March 1, 1984, in New York City.)

I would like to share with you on two levels: First, I'll share a few general principles of marketing and advertising you might pick up in a business school course. In addition, I will share some experiences we've had at Sayre School in the areas of marketing and advertising.

Before we talk about advertising we have to talk about marketing. Advertising is not marketing. Advertising is a part of promotion and promotion is one part of marketing.

The object of most marketing today is to fulfill an existing customer need. This is a different view of marketing than existed 50 years ago, when the demand for manufactured goods exceeded the supply. Fifty years ago, industrialists looked for a clever new invention or a better way to produce an existing good. The order was build it first, sell it second. That was the "build a better mousetrap..." era.

Today, because of increased productivity, we have idle production capacity — both human and machine. We are bombarded with goods and services. A successful business today identifies a customer need, and then provides a good or a service to meet that need. Today "the customer is king."

The implications of the marketing philosophy are frightening to educators. "You mean we have to let students and parents decide what we teach?" To a certain degree, yes. Let me use my school as an example.

In the last 20 years we have:

- Added courses in Russian.
- Dropped courses in Russian.
- Started football; dropped football.
- Started track; dropped track.
- Started instruction in computer programming.
- Started a prekindergarten program.

The point of the marketing philosophy is you add a course, say Russian language, not because you happen to have a teacher who can teach it, but because people want the course or program and it is financially profitable to offer it.

Four Elements Of Marketing

No discussion of marketing would be complete without the "four P's." Marketers generally talk about the four parts of the

marketing mix: Product; Price; Place; Promotion. These apply to independent schools — boarding and day.

What are your customers really buying? What is your product?

We are in the education business. But, we're selling more than education. What are we selling? Reliability? Yes. Prestige? Yes. Safety? Yes. Personal Service? Yes. Our product is more than education. Before you start advertising you must know what your target group wants and what you are selling.

The second P is price. What does it cost? Of course, this is more than tuition. Price also includes: Do you have a payment plan? Scholarships? Loans? How much is your deposit? Is your price lower than the price for other area schools? Maybe you should put your price in the ad. Invite people to shop around. Are you the most expensive school in the state? Maybe you're worth it.

The third P is place. Where are you? Or more important, how do I get there? Occasionally we hear of an inner city school moving to the suburbs. But, that is rare, and expensive.

How does a student get to your school? Do you run buses? Arrange car pools? Can a child stay until I get off work at 5:30? Some of the schools in Lexington are trying to get the city to change bus routes to give those schools more convenient service. They are trying to change their relative location.

Boarding schools — how do you make it easy for students to get to your school? Do you run a bus to the nearest major airport? Do you run buses to and from shopping centers or other central points in the big city for the convenience of parents?

Joel Strangis has been the director of admissions and development for the Sayre School in Lexington, Kentucky since 1981. Previously, he was the associate director of development and director of the annual fund for Transylvania University, also in Lexington. Among his professional activities, Mr. Strangis has spoken at the National Association of Independent Schools national conference and has chaired pre-conference workshops at a CASE convention this year. He received his bachelor of arts degree from Transylvania University and is currently a graduate student at the University of Kentucky.

A few years ago Drake University of Des Moines, Iowa, bought a billboard just outside Chicago's O'Hare airport. The message? "Just 45 minutes from Drake." The school was trying to break down a stereotype of Chicago area families that Des Moines was a faraway place. You can address problems of location, either by changing your location, or changing people's perception of your location.

The fourth P is promotion, which includes more than advertising. Promotion includes the package. How does your campus look? How do people dress?

Promotion also includes salesmanship. Who talks to me when I call? How long does it take for me to get materials? Are the materials attractive? And promotion includes advertising — real commercial advertising, sometimes called display advertising. It is the most effective way to reach people today. You have to match media, message and target audience, but once you do, it really works.

Headmasters or development directors say, "Well, we put out a lot of press releases and we get pretty good coverage." Fine. So do we. But, the newspaper editor prints what he wants about you, when he wants, where he wants. When you advertise you control the process. You get exactly what you want, where you want, when you want.

You must answer six questions before beginning an advertising program. These are:

- Why advertise? Or what is your purpose?
- Who is your target audience?
- What is your desired response?
- Which is the most effective media plan?
- What message will you send?
- How will you collect feedback?

Why advertise? What is it you hope the ads will accomplish? Will they reduce attrition? Increase enrollment? Better community relations? Obtain a higher quality student? All those are legitimate goals. Once



In August 1983, Sayre School conducted a survey to determine who was reading its newspaper ads. Three survey groups were identified:

GROUP A: All Sayre families, who had had a child accepted at Sayre for the 1983-1984 school term and had paid the \$100 deposit by August 1.

GROUP B: Neighbors of Group A. We tried to pick families with school age children, but not attending Sayre in 1982-1983 or 1983-1984.

GROUP C: Families with one or more children at Sayre in 1982-1983, and who

had paid the \$100 deposit for one or more children by August 1, 1983. (One-third of the families were selected by going through an alphabetical list and choosing every third one.)

The August newspaper ad was run August 9 and August 16. The surveys (272) were bulk mailed August 18. On August 29, a second survey was mailed to 132 families (first-class) who had not yet responded.

On September 9, a reminder post card was mailed to 68 households who had not yet responded. Surveys not returned by September 16 (30 days after the second August ad) were excluded from the results.

Table 1: Response by Group

	New Group A	Neighbors Group B	Re-enroll Group C	Total
Number Mailed	94	84	94	272
Bad Address	0	4	0	4
Net Surveys	94	80	94	268
Responses	81	69	67	217
% Response	86.17%	86.25%	71.28%	80.97%

Fourteen households of Group B, did not have school age children (ages four to 17) and are excluded from most tables. Five households of Group B, identified that someone in the household (possibly an adult) had attended Sayre School. Since this attendance was not in 1982-1983 or 1983-1984, these five are included in most tables.

The survey asked: "Do you recall seeing or hearing an advertisement for Sayre School in the past two years?" Respondents replied as follows:

Table 2: Ever Saw Sayre Ad

	New Group A	Neighbors Group B	Re-enroll Group C
Yes	88.4%	48.1%	88.9%
No	31.6%	51.9%	11.1%
Total	100.0%	100.0%	100.0%
Respondents	76	54	83

While Group A and C definitely score higher than Group B, as expected, it is interesting that Group C scores so much higher than Group A. This is possibly a cumulative effect, however, representing the longer time frame of Group C's interest in Sayre.

The survey also asked: Do you recall seeing or hearing an advertisement for Sayre School since August 1, 1983? The response is reported in Table 3. (There were two ads costing approximately \$175 each.)

Table 3: Saw Sayre August Ad

	New Group A	Neighbors Group B	Re-enroll Group C
Yes	39.5%	29.1%	45.9%
No	60.5%	70.9%	54.7%
Total	100.0%	100.0%	100.0%
Respondents	81	55	64

Group C (families re-enrolling a child at Sayre) still scores highest. Yet, Group A (new families) still scores above the neighbors by a comfortable margin. The gap between new families and the re-enroll group seems to have narrowed since our first results in Table 1.

you specify a goal, the answers to the other questions will follow.

Recognize Problems

Many times what we call a problem is really only the symptom of a problem. Do you have too few students? That's only a symptom of the problem. Perhaps the problem is people see you as too high priced, or not worth the money. Maybe people don't even know you exist.

Your advertising program should be designed to meet a specific problem or promote a specific service. If you study a successful advertising program you can probably find the problem it is designed to address.

How do you find your real problems? The answer: Market Survey. Before we began our ad program at Sayre we did a scientific image survey of 1,000 area families. Personally, I visited about 40 current trustees, former trustees, current parents, former parents and alumni. I asked what they thought about the school, what were the strengths, what were the weaknesses, why their children attended, or did not attend. Three problems became clear:

1. The school went through a difficult time five to ten years ago. Many people still held an impression of the school based on that period.

2. Many current parents were not clear why their children attended Sayre.

3. Lexington residents tend to be complacent about their schools. The Lexington schools are among the best in a state that has one of the worst education systems in the nation. Lexington schools look very good to someone who grew up in rural Kentucky 20 years ago.

We decided to develop an advertising plan that would attack those three problems.

1. We would try to give an accurate, current view of the school that stressed academic quality.

2. We would try to give our own parents some "cocktail ammunition," something to say when they were cornered at a cocktail party by someone saying, "Why do your children attend Sayre?"

3. We would try to raise the collective evaluation about what is a "good school." We would not attack the public schools, we would simply say what we did and let parents make their own comparisons.

Your second question is: Who is the target audience? Who are you trying to reach? At Sayre, our ads are primarily aimed at middle-class and upper middle-class parents of students ages three years to 16 years living in the Greater Lexington area.

But, your target audience may be different. Maybe you are a boarding school and want to reach students ages 12 to 14 years, and their parents in a four-state area. Or

	Group A	Group B	Group C
Age	10-12	13-15	16-18
Gender	50% M, 50% F	50% M, 50% F	50% M, 50% F
Income	\$10,000	\$15,000	\$20,000
Education	10	11	12

On the grounds that they are a high school senior, where did they see it?

	Group A	Group B	Group C
Media	100.0%	100.0%	100.0%
Radio	0.0%	0.0%	0.0%
TV	10.0%	10.0%	10.0%
Print	90.0%	90.0%	90.0%
Education	10	11	12

How did they see it? (Check all that apply. Assume some respondents (25%) saw it on the radio, but not on the TV.)

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Print	90.0%	90.0%	90.0%
Education	10	11	12

On the grounds that they are a high school senior, where did they see it?

How did they see it? (Check all that apply. Assume some respondents (25%) saw it on the radio, but not on the TV.)

maybe you are trying to reach minority students. Maybe you want more girls. Different decisions about your target market will lead to different choices of media and message.

Remember, in recruiting students over the age of say ten- or 12-years-old, you often have a troika decision process with mom, dad, and junior each having a veto. You may have to use one type of message and medium for mom and dad, and another message and medium for junior.

So, now you know what you are selling and who you are going to sell it to. Great. Your third decision is what do you want the target audience to do? Ultimately you want your target audience to buy the product, enroll a child, send money, whatever.

But, more realistically if I read your ad, and I respond favorably what will I do? The best you probably can hope for is that I will call for more information or mail in a coupon. I will probably not send you a check for one year's tuition because I read your ad in the morning paper.

Your ad might make me aware of your school. It might even make me interested in your school. But, it probably won't make me send that tuition check. This is called a response hierarchy model: The steps I must go through before I will take action. One of these models uses four steps:

AWARENESS
INTEREST
DESIRE
ACTION

Media Effectiveness

The primary goal of the study was not to see the relative effectiveness of radio and television. The study was to see if radio and television were effective in reaching the target audience. The study was to see if radio and television were effective in reaching the target audience.

In the morning paper, the study was to see if radio and television were effective in reaching the target audience. The study was to see if radio and television were effective in reaching the target audience.

Each Sayre School ad features a separate theme describing the institution's assets.



In other words, I have to be aware of your school, I have to have an interest in what you do, and I have to desire the benefits of your product, before I will take action.

Prompting Action

When we first started advertising, in April of 1982, we asked every caller, "How did you hear about the school?" The most frequent response was, "Well, I've always known about the school, but I saw your ad in the paper today and I decided to call." The callers were aware. The ad provoked interest, desire, and action.

This is a spiral process. In other words, awareness should produce a certain amount of interest, which produces a certain amount of desire, which produces an action. That action, say calling for a brochure, restarts the process with a new level of awareness — interest — desire — action. At the next level maybe your action is visiting the campus, which starts a new level of awareness — interest — desire — action. At the next level maybe you send in an application and so forth.

This is why I no longer believe in advertising open house events. You are asking for too large a jump in the awareness — interest — desire — action spiral. Your open house ad may get awareness, but does it produce interest and desire?

We don't advertise our open house. We advertise Sayre School. Everyone who responds to the ad gets a brochure, an invita-

Although Sayre School is the oldest independent school in Kentucky (founded in 1854), the administration places emphasis in ads on the institution's excellent teachers, modern equipment and quality programs rather than its age.



tion to the open house, and a telephone call from a current parent inviting them to the open house.

The Best Medium

Your next choice is media. Radio? Television? Newspaper? Magazine? Billboards? You'll also have to decide when and how

often. One ad does not do it. One common rule of thumb is you must see an ad two-and-a-half to three times in order for it to "sink in."

What type medium depends on your decision above on your target market.

Television production that is good quality, professionally photographed and directed is very expensive.

Even if you have a trustee who owns a station, you still face the problem of frequency and cost of air time. You have to be on television a lot before people see you three, four, five, times. You probably can't afford time during MTV or the Superbowl, but maybe you can afford a regional sports event. But, is that the image you want to portray?

You probably can get radio production donated, if you stay on one station. We surveyed our parents and asked, "What radio station do you listen to the most minutes per day?" We got a dozen different answers. In order to reach 50 percent of our parents we would have to be on four different stations.

The highest score for any station was 22 percent. If we want to reach students, however, it's a different story. Fifty-five percent of our students in grades 7 to 11 listen to one station. I've just got to figure out an ad that's a credit to our school, doesn't talk down to 12-year-olds and fits between Culture Club and Billy Joel.

Newspaper advertising works for the Sayre School. For one thing you can cut the ad out, save it, show it to your spouse

Advertising Survey, page one

1. What newspaper(s) do you subscribe to? (Check as many as appropriate)
 - ☐ Lexington Herald-Leader (daily, Mon - Sat)
 - ☐ Lexington Herald-Leader (Sunday)
 - ☐ Louisville Courier-Journal (daily, Mon - Sat)
 - ☐ Louisville Courier-Journal (Sunday)
 - ☐ Other. Please list _____
 - ☐ None
2. On the average, how many days per week would you say you usually read the Lexington Herald-Leader? (Please circle one.)

7 6 5 4 3 2 1 or less never read it
3. On the average, how many hours per day would you say you listen to the radio? (Please circle one.) (If "never", skip parts b and c.)

4 or more 3 1/2 3 2 1/2 2 1 1/2 1 1/2 or less never
- b. Please list the radio station you listen to the most minutes per day: _____
Is this an AM or FM station? _____
- c. Please list the radio station you listen to the second most minutes per day: _____
Is this an AM or FM station? _____
4. On the average, how many hours per day would you say you watch television? (Please circle one.) (If "never", skip part b.)

4 or more 3 1/2 3 2 1/2 2 1 1/2 1 1/2 or less never
- b. Please list the three television shows you watch most frequently: (Please list most often watched #1, second most often watched #2, etc.)

#1. _____

#2. _____

#3. _____

Page one of four, please turn to the next page.

UNIVERSITY OF KENTUCKY LEXINGTON, KENTUCKY 40506

OFFICE OF
UNIVERSITY INFORMATION SERVICES

August 17, 1983

Dear Lexington Resident,

Newspaper, radio, and television announcements are just a few of the methods we use to communicate with the people of Kentucky. Our budgets are limited, however, and we must select those methods of communication that are most effective. We are participating in this survey in order to gain information that will help us make future communications decisions.

I hope you will help. Your household has been selected in a scientific survey to represent many other households. Your responses to these questions are very important. Please answer the questions carefully and to the best of your knowledge. Your answers are entirely confidential and will not be identified to anyone.

In order to save the cost of sending you a second mailing, please take time, today, to complete and to return the enclosed questionnaire.

Thank you very much.

Sincerely,

Bernie Vonderheide
Bernie Vonderheide
Director

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Advertising Survey, page two

The following institutions have run one or more ads in Lexington area newspapers, or radio stations, or television stations, or a combination of the three since August 1, 1983. When answering about the content of the ad please be as brief, but as specific, as possible. For example, if you were to describe the content of a television dog food commercial you might say "Lorne Greene talked about the meaty content of the dog food."

5. The University of Kentucky
 - a. Do you recall seeing or hearing an advertisement for the University of Kentucky in the last two years? (If "No" skip to #6, next page.) Yes ☐ No ☐
 - b. If you have heard or seen an advertisement for the University of Kentucky was it: (Mark as many as apply)
 - ☐ In the Newspaper
 - ☐ On the Radio
 - ☐ On Television
 - c. Do you recall seeing or hearing an advertisement for the University of Kentucky since August 1, 1983? (If "No" skip to #6, next page.) Yes ☐ No ☐
 - d. Newspaper: Do you recall seeing an ad(s) in the Lexington Herald-Leader for the University of Kentucky since August 1? Yes ☐ No ☐
If Yes: Do you recall what the ad(s) was about? Yes ☐ No ☐
If you can, please tell about the content of the ad(s): _____
 - e. Radio: Do you recall hearing an ad(s) on the radio for the University of Kentucky since August 1? Yes ☐ No ☐
If Yes: Do you recall what the ad(s) was about? Yes ☐ No ☐
If you can, please tell about the content of the ad(s): _____

Advertising Survey, page three

6. Sayre School
 - a. Do you recall seeing or hearing an advertisement for Sayre School in the last two years? (If "No" skip to #7, next page.) Yes ☐ No ☐
 - b. If you have seen or heard an advertisement for Sayre School, was it: (Mark as many as apply.)
 - ☐ In the newspaper
 - ☐ On the radio
 - ☐ On television
 - c. Do you recall seeing or hearing an advertisement for Sayre School since August 1, 1983? (If "No" skip to #7, next page.) Yes ☐ No ☐
 - d. Newspaper: Do you recall seeing an ad (or ads) for Sayre School in the Lexington Herald-Leader since August 1? Yes ☐ No ☐
If Yes: Do you recall what the ad(s) was about? Yes ☐ No ☐
If you can, please tell about the content of the ad(s): _____
 - e. Radio: Do you recall hearing an ad(s) on the radio for Sayre School since August 1? Yes ☐ No ☐
If Yes: Do you recall what the ad(s) was about? Yes ☐ No ☐
If you can, please tell about the content of the ad(s): _____
 - f. Television: Do you recall seeing or hearing an ad(s) on television for Sayre School since August 1? Yes ☐ No ☐
If Yes: Do you recall what the ad(s) was about? Yes ☐ No ☐
If you can, please tell about the content of the ad(s): _____

Page three of four, please turn to next page.

- 7 to 12 years ☐ 40 to 49 years ☐
13 to 17 years ☐ 50 years or older ☐

12. Have you, your spouse, or any of your children ever attended Sayre School? (If enrolled for fall, 1983 answer "yes".) Yes ☐ No ☐
13. Have you, your spouse, or any of your children ever attended the University of Kentucky? (If enrolled for fall, '83 answer "yes".) Yes ☐ No ☐
14. Are you or is anyone else in your household employed by Sayre School? Yes ☐ No ☐
15. Are you or is anyone else in your household employed by the University of Kentucky? Yes ☐ No ☐

Thank you for your cooperation. Please return this survey in the enclosed envelope as soon as possible.

when he/she gets home from work. The kind of parents we're looking for are parents who read. Teen-agers don't read the newspaper. Many beer drinkers don't read the newspaper. People who are going to pay \$3,000 per year for an elementary school education read the newspaper.

We surveyed our parents: Over 80 percent of our parents subscribe to the *Lexington Herald-Leader*. Two-thirds of our parents say they read it everyday. I try to avoid ads on Wednesday (you get lost in the food ads). On Saturday and Sunday there is no one at school to answer a phone

call, if the people call. For the same reason I try to avoid Fridays. What if they don't read the paper until Saturday? I like Tuesdays best.

Maybe newspapers won't work for your school or you just can't afford the *Boston Globe* or *The New York Times*. How about

regional magazines. Most big cities have one. Or how about the regional issues of a national magazine? *Time*, *Newsweek*, *Sports Illustrated*, *Playboy*, all offer regional issues. Or how about regional airline magazines: *Republic*, *Piedmont*, *U.S. Air*.

If you have a religious affiliation consider religious magazines that might get donations as well as students. Also, keep in mind, some national magazines give a 50 percent educational discount. It's worth a try. Remember you want to advertise in something your target market reads.

I'm not sure how effective billboards are for our type of advertising. I gave the example of Drake University above. Someone told me the maximum number of words on a billboard is seven.

Maybe billboards would be good if you are located near a major highway, but nobody knows you are there. "Just five more miles to Flatbush." You'll get frequency, generally you have to buy for one month. If people drive by everyday for a month that's 20 to 25 exposures per person.

Timing Is Important

When do you advertise: When demand is high or when demand is low? Think about our marketing philosophy. We're not advertising to get people to buy something they don't want. We're advertising to tell them about something they want, when they want it. So, you advertise when your target group is making the decision.

When do your people make a decision? Our market goes something like this:

November-December: Boarding schools on the prowl. People are trying to decide between Sayre and boarding school for grades 9 to 11.

January-February-March: Parents are thinking ahead for prekindergarten, kindergarten, first grade: Where is little Suzie going to school next year?

April-May: Not much going on here. If anything mom and dad are sick of P.S. 49: "You're not going back to that school next fall!" especially grades 2 to 8. Remember another big decision here. Parents are deciding if Johnny is coming back to your school. Maybe some ads to reinforce reasons for staying.

June-July: Not much here. Go on vacation. Write next year's brochure.

August: All hell breaks loose. New families moving to town. People finally face the reality of P.S. 49. Also, in August, all those families who paid a \$100 or \$200 deposit are now deciding whether they really want to pay the remaining \$3,000 for an education at your school.

You must choose the best season for you.

Another consideration is cost. You'd like to wheel and deal a little bit for unused time and space — so stay away from the heavy media periods. August and September is back to school sales time. October and November is political campaigns. November and December is Christmas sales.

We like the period from January to May,

but avoid spring break. We'll also run two or three ads in August primarily aimed at people who recently moved to town.

Your next decision is message. What are you going to say? Of course, if you have decided why you are advertising, picked your target market, established the desired response, and decided when and where the message will appear, you have some excellent guidance. But, this is where the science of advertising suddenly becomes the art of advertising.

Are you interested in getting a bigger share of an existing market or increasing the market size? Your message must address your problem. We are a college prep school in the state that has the lowest percentage of adult high school graduates in the country.

That's why we adopted the theme "Come and see how good a school can be." Many Kentuckians don't know how good a school can be. There's only one other independent day school in a 20-county area. I'm trying to build the market because I know we'll get at least half of any increase.

If I worked for a Midwest boarding school I would try to build interest in boarding schools. Maybe even cooperative advertising with competing schools. If I worked for a boarding school in New Hampshire, or a day school in Boston I'd try to distinguish my school from the competition. Maybe "why we're better for your child than those other schools," or why "we're as good but cost less." There's not much I can do to increase the market for independent schools in New England, so I'd try to get a larger share of the existing market.

Another point on message — go for quality. Make sure your ad is a good representative of your school.

Who should write it? The headmaster or development officer should know more about your school than anyone else. Let an ad agency design the ad, produce the ad, place the ad, but don't let them write it. Don't let the chairman of the English department write it. This is salesmanship, not an English essay.

If you are doing a series, consider having a parent or student do an ad as a testimonial. Reserve the right to edit, but if they don't like the editing you won't print it. Never promise anyone you'll print whatever they write.

Finally, sell the benefit, not the feature. Don't give lists of features at your school, tell me why my child will be happier, brighter, better looking at your school. "We have one teacher for every ten students." This is a feature. "Our teachers have the time to answer your child's questions." That is a benefit.

Track Response

Feedback. How will you know if the ad worked? Mail-in coupons or counting telephone calls is one way. But, how are you going to compare those? Let's say you are going to have people call in. Did you get more calls the week of the ad? How many

more? That means that when you are not running ads, you should be counting the calls per week, applications per week, etc.

Sayre got into this late. We didn't keep track of how many inquiries per week until the few weeks before we ran our first ads. In the three weeks before we ran our ads in 1982, we averaged seven inquiries per week. During the seven weeks we ran our ads we averaged 13.85 inquiries per week, or almost double the number of inquiries we might have expected — 48 more inquiries.

Since one out of every four people who call for information, eventually enroll at our school, we expected 12 more students than the previous year. That was just exactly what we got. Twelve more new students for the fall of 1982, than in the previous year.

Who reads ads? During the 1960s a hot marketing topic was "cognitive dissonance." In other words people try to reduce anxiety about a large purchase, by selecting information that reinforces their decision. The topic has been debated back and forth over the years. We decided to test it with our parents.

Last summer we surveyed three groups: A random sample of our parents who had re-enrolled a child for the fall; all of our new families who had deposited; neighbors of our new families with school age children who did not attend Sayre. (The survey was disguised to look like it came from an outside group.)

We asked each group: "Do you recall seeing or hearing an ad for Sayre School in the last two years?" The answers were as follows:

- 48 percent of the neighbors indicated they had seen or heard a Sayre ad.
- 68 percent of the new families had seen or heard a Sayre ad.
- 89 percent of the re-enrolling families had seen or heard an ad.

While advertising is a good method for communicating with prospective families, keep in mind it is an excellent method for communicating with your current families as well.

Case Studies

Sayre began its ad program in April of 1982. We committed to seven newspaper ads. I wrote the copy for six of the ads, two seniors wrote the copy for the seventh ad. We hired a professional ad agency to design and typeset the ads. We paid regular rates for production and newspaper space. The ad agency waived the standard 15 percent agency commission as a favor to us.

Each ad had a separate theme. The first ad "A part of Lexington since 1854" told about our role in the community: "We're as old as our antebellum administration building and as new as our Apple computers." We also had an ad on our sports program, "Yes we have no football." And in one ad we saluted our teachers by listing all their names.

Each ad was built around the theme, "Come and see how good a school can be." As I mentioned above, we doubled the number of inquiries per day during the period of the ads. We also increased the deposit rate for the fall among current students.

The printed ad is very versatile. We reprinted one ad in our quarterly newsletter. We reprinted another ad on the back of the program for our spring auction. We also did 1,600 self-mailing reprints of the entire series. About 400 of the reprints were bulk mailed to current families. About 200 reprints were mailed to prospective families.

Then we picked three "upscale neighborhoods" that contained lots of families with school age children. We mailed to every household in those neighborhoods by "carrier route sort." That amounted to another 900 to 1,000 reprints.

Our cost for the 1982 program was \$3,013.55, excluding staff time. While the response from new families was impressive, the response from our own families was unbelievable. Enthusiasm for the school grew on all levels. Even faculty learned things they had never known about the school.

In 1983, we felt we had "staked out our territory" and we wanted to do something a little more soft sell. We wanted to do a series that would be seen as a community service thereby establishing us as Lexington's "flagship educational institution" and that would be helpful as we prepared for a capital campaign in the community.

We came up with the "Parents Ask Us" theme. We did five ads on topics of interest to the parents of school age children. The ads ran simultaneously on radio (two a day for six weeks) and in the newspaper (one a week for five weeks).

The radio station did the production for free and gave us a "deal" on the purchase of air time. The ads consisted of a parent with a nice deep voice doing the introduction, a secretary (who has four children at our school) asking the question, and the teacher reading his or her own copy, which I had edited heavily. We ran approximately the same copy in the newspaper. Actually, we had a few more words in the newspaper ad than on the radio. What happened?

- In 1981, we had about 105 new students.
- In 1982, the fall after we started our ads, we had 117 new students.
- In 1983, after two years of ads, we had 161 new students.

This year we are going to stay with the "Parents Ask Us" theme. We're going to stay with newspaper only and add two or three new ads in the theme. We are also going to reprint that series, possibly looking for a corporate sponsor.

Budget Depends On Situation

How much should you spend? Decide first what it is you want to do. Then decide what it will cost. You may have to make some compromises between what you would like to do and what you can afford. But, the worst thing you can do is to say first "what can we afford?" and then design a program to meet that budget.

Only as a guideline, I suggest you spend one to two times the total tuition and fees from your highest income student. For most day schools, we're probably talking about an annual budget of \$4,000 to \$8,000 for real advertising. For most boarding schools, we're talking about an annual budget of \$7,000 to \$16,000.

Sayre spends about the tuition and fees for one high school student. We are able to reach our goals for less than most independent schools, because we are a day school in a small media market.

Lexington is the 78th largest media market in the country. Yet, we are large enough to have a daily newspaper, three local television stations, seven local radio stations and the state's educational television studios.

Be careful of getting things donated, either production or media space. Remember you are advertising so you can control the what, the when, and the where. If a newspaper gives you free advertising space, but you surrender control of the when and the where, is it worth it? If a friendly graphics artist volunteers to produce the ad, but then entirely misses the point of your campaign, is that worth it?

True Confessions

Now it is time for true confessions. I can tell you that in the last two years our enrollment is up 20 percent. Our rate of retention is up 4.8 percent. Our income for current operations is up 33 percent. This year we already have as many applications for fall as came in all year before we started the ads. But, I cannot tell you of anyone who said I enrolled my child because I saw your ad.

If you think about what I have said, however, these results are not surprising. People will not buy a high ticket item, a car or an education, because they saw an ad. The ad only starts that awareness — interest — desire — action spiral. Advertising is only one part of a marketing program. •

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Appendix XVI

Getting Your Photography Together

Without good photography, there is little chance of producing nice-looking publications. Photography should be a line item in every school's annual budget. Freelance photographers charge anywhere from \$250 to \$750 @ day, plus film, processing, contact sheets and printing. They expect to have travel and living expenses reimbursed. 5 x 7" prints are adequately large for general use.

Try to persuade your photographer to allow the school to retain ownership of the negatives for your permanent archives.

Book the photographer well in advance of the time you wish him/her to visit your campus. Plan what you want photographed, notify teachers of the upcoming disruption and plan to assist the photographer around the building(s). Ask the photographer to shoot black and white film for publications (transparencies for an A-V program). Some can shoot both kinds of film concurrently if you are unsure of the final use. Avoid use of flash to boost available light as looks unnatural.

Edit contact sheets carefully--use a LUPE (magnifying glass) and grease pencil (can rub off with tissue) to indicate the frames you want printed. Make sure prints are keyed to contact sheets for future reference. It is useful to know photographer's name, date of shooting and subject for each print.

To prepare photos for use in a publication, tape photo to sheet of paper and then cover with a rectangle of tracing paper. Indicate cropping on tracing paper, not on photo. Do not cut photo; you may want to use it again.

Keep photos in central place (not some in admissions office, some in alumni office, some in yearbook office). File prints by subject alphabetically, with a cross referencing system to contact sheets. File contact sheets chronologically with an index of subject matter. File negatives with contact sheets if you own them. File transparencies (slides) in plastic sleeves with date, subject and photographer written on slide mount.

Subjects you should have on file in the permanent archives--KEEP CURRENT:

Dated Events

registration
student/faculty orientation
convocation
volunteers weekend/orientation
parents/grandparents day
project day (school service)
"mini" term special activities
telethons
senior dinner dance
cum laude and prize ceremonies
alumni day/weekend
commencement

Other Special Events & Activities

student productions & recitals
art exhibits
special guest speakers
club-sponsored events
fund-raising events (on/off campus)

Academic & Campus Life

community service
classes & special projects
library/computer
leisure activities/dorm life
students -- faces
faculty/student interaction

Sports

EACH season
coaching
athletic equipment

Biographical

faculty (all faculty)
trustees and volunteer leaders
academic, sports & student gov. leaders
members of the nonteaching staff
(buildings & grounds, kitchen)

Summer School/Extended Day Programs

Prepared for this Handbook by Carol L. Cheney

Appendix XVII

Publications Budget Worksheet

The following information is needed in order to obtain an accurate estimate of the costs of producing a new publication. If you do not know exactly what the piece(s) will look like, choose a sample of an existing publication that is similar to the one you are planning and use it for the basis of your fact finding.

PRINT RUN

The quantity you want printed (make sure to account for distribution within your school and for use by other than the originating department). Printers can give you an option for printing additional copies at a @ thousand or a @ hundred rate over the base amount. Save 5 samples for your records.

FLAT SIZE

Dimensions of the piece opened out, including flaps or pockets. This information is important in calculating the amount of paper and the press sheet size to run the job.

FINISHED SIZE

Dimensions of the piece folded and/or bound.

NUMBER OF PAGES

Total number of individual pages (taken from the finished size) + cover, if there is to be one. If piece is a flyer, count panels front and back. Note: page numbers are even on the left and odd on the right; do not count inside front cover as page 1.

BINDING

Number of folds, perforating if needed, how piece will be held together. Most common is saddle wire stitching (staples). Perfect binding gives flat spine, with pages glued to cover. Also available is GBC binding (plastic comb), spiral binding, etc.

STOCK

Paper choice for text; choice for cover. Ask for options, as prices vary. Inquire about "house" stocks or "broken cartons" from other jobs. Coated paper is more expensive, but provides the best surface for good reproduction of halftones.

INK

Number of colors for text (black counts as a color). Printers use Pantone Matching System (PMS) colors--ask to see swatches. When printing 4-color, the term used is "process"--accents of combinations of black, magenta, cyan and yellow can be used with full-color photos. If heavy ink coverage to be used on cover, ask price for varnishing (matte or glossy) to seal. Get separate price for die cut or blind emboss.

TYPE

Get separate quote on typesetting and photostats.

MECHANICALS

Get separate quote on preparation of camera-ready mechanicals, or "boards."

HALFTONES

How many; will any require silhouetting? If you plan to use black plus a PMS color, the photos can be printed as duotones, combining the ink colors.

TRANSPARENCIES OR COLOR ART

If you plan to run something in full color, indicate how many individual shots will be in color and their approximate finished size. You must start with A+ originals.

BLEEDS, SCREENS, KNOCK OUTS

Will elements of design bleed (run off) edges of paper? Will you use tint blocks in graphs or charts? Will type reverse out (knock out) of black or a second color? Let the printer know, as this will require extra preparation.

PACKAGING

Bulk in cartons, or shrink-wrapped in lots of 50 or 100, etc. If you expect printer to collate and/or insert, communicate this information.

DESTINATION/DELIVERY

Find out what shipping charges you will incur to get the job delivered to your school, the post office or a mailing fulfillment house. Get quote on fulfillment.

GET 3 BIDS ON BIG JOBS. ASK ABOUT TURN-AROUND TIME. GIVE PRINTERS IDENTICAL INFORMATION and ASK FOR THEIR QUOTES IN WRITING. PLAN AHEAD AND YOU'LL SAVE \$\$\$.

Prepared for this Handbook by Carol L. Cheney

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